DigiWin
Portal User Manual
For Administrator

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DigiWin Systems Group Holding Corp.

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1. Start Using DigiWin Portal

Open the explorer and enter the website address: http://{Portal's IP}:8081. The login page of Portal is shown below.

- firstVisit

Sign In

Tips {Portal's IP} Please consult your system administrator. For first use, you must set operating environment. Please refer to the section "Environmental setting for first use".

1.1 Environmental Setting for First Use

For first use of Portal system, please set your operating environment according to the following instructions.
Click "firstVisit" on the top menu bar of the login page to activate the setting instructions, and then set your operating environment according to the instructions.

- firstVisit

1.2 About DigiWin Portal

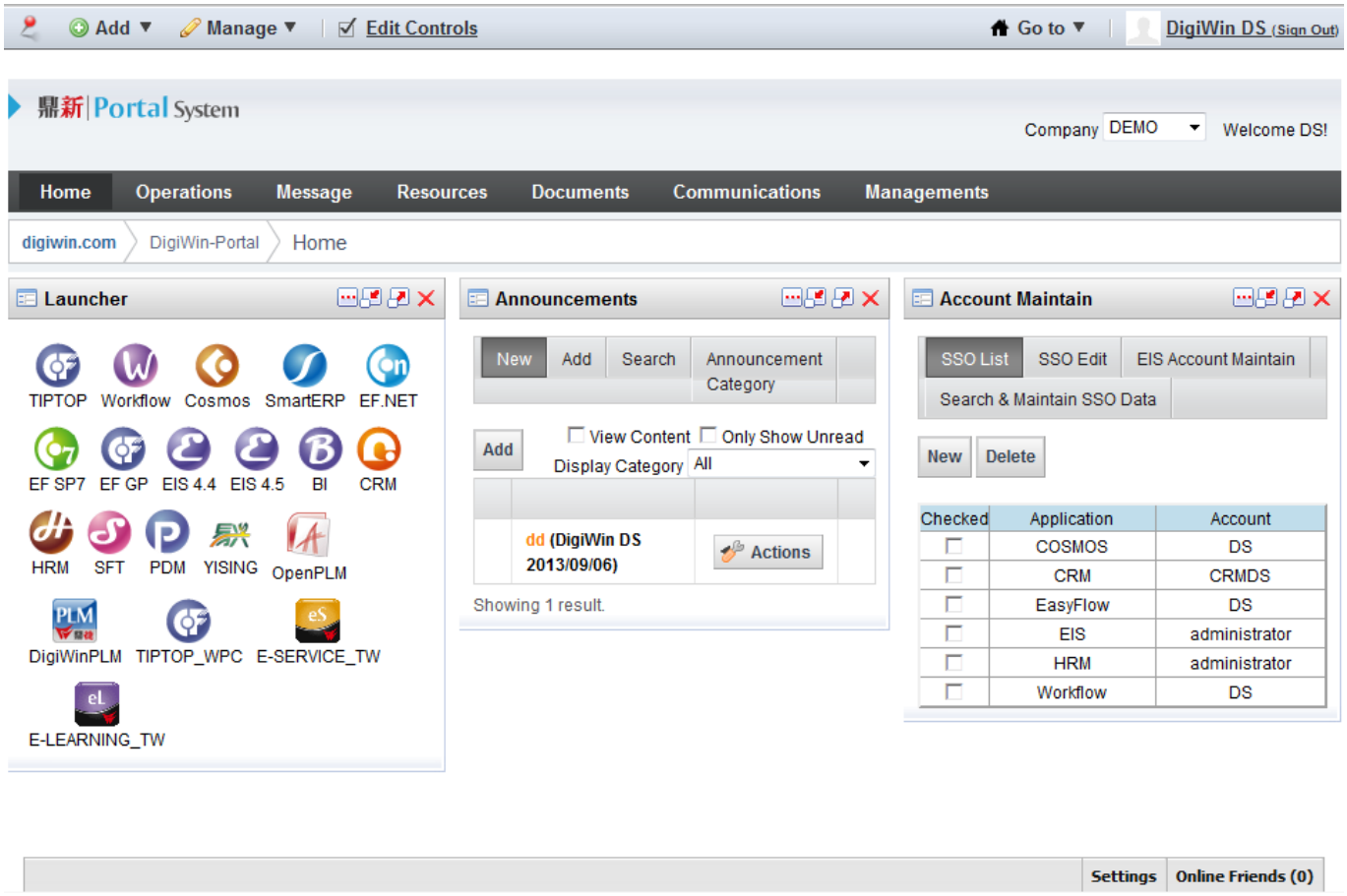
View DigiWin Portal information.

1.3 Portal Login

Enter your username and password on Portal login page and click “Login”.

Tips Portal will automatically remember the account you entered last time (The function of Use cookies must be activated in the explorer)

The following is the page of a successful login.



1.4 Portal Logout

Click “Sign Out” on the top menu bar to log out the Portal system.

1.5 Menu Bar

Main menu of the Portal system is divided into two areas: (1) Basic menu (2) Function tab.

1.5.1 Basic menu

Basic menu contains the following items:

Basic menu	Description
Lock basic menu	If basic menu is not locked and the page is scrolled down, the menu will hide; if basic menu is locked, the menu will be fixed on the top of the window.
*Add	Add a function tab, “Document and Media Display” Portlet, “Navigation” Portlet or other Portlets to the page
*Manage	“Page”, “Page layout”, “Page Customizations”, “Site Settings”, “Site Pages”, “Site Memberships” and “Site Content” enables the user to administer and edit pages or page content effectively
*Edit Controls	Check edit control to display Portlet toolbar. If not, the toolbar will not be displayed
Go to	Switch to different community pages
User name	Modify the user’s personal data
Sign Out	Log out Portal system

Tips The item marked with * applies to system administrator only.

1.5.2 Function Tab

Function tab contains the following items:

Function tab (DigiWin-Portal community)	Portlet list
Home	Links, common menu, bulletin board, to-do list, calendar, account correspondence setting
Operations	Program list flowchart
Message	To-do list, message center
Resources	Conference reservation
Documents	File management
Communications	Contact information
* Managements	Equipment management, conference room management, system parameter setting, administrator, company type, SSO system setting, voting management

Tips The item marked with * applies to system administrator only.

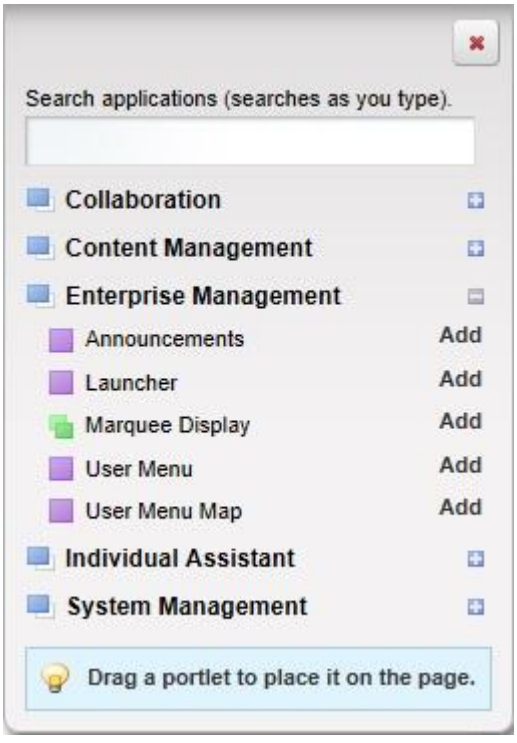
1.6 Switch to Community or Organization Page

Click “Go to” on the top menu bar to display the community or organization to which the user belongs. Click to switch to the page of that community or organization.

1.7 Add an Application

1.7.1 Add Portlet to Page

Click “Add” on the top menu bar and select “More …” to display all Portlet menus. Click “Add” to add the Portlet to the page. By default, the new Portlet appears on top left corner of the page.

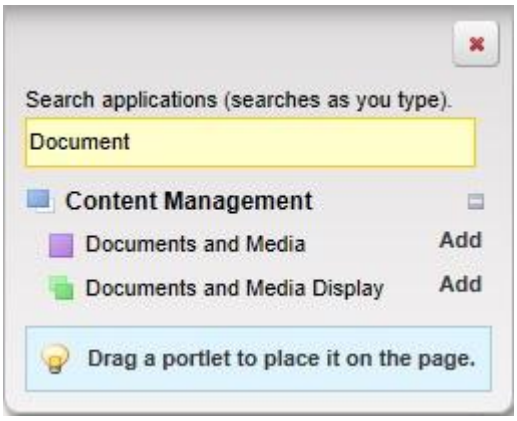


Tips Description of icons before Portlet name:

- means only one such Portlet can be placed on the same page
- means two or more such Portlets can be placed on the same page

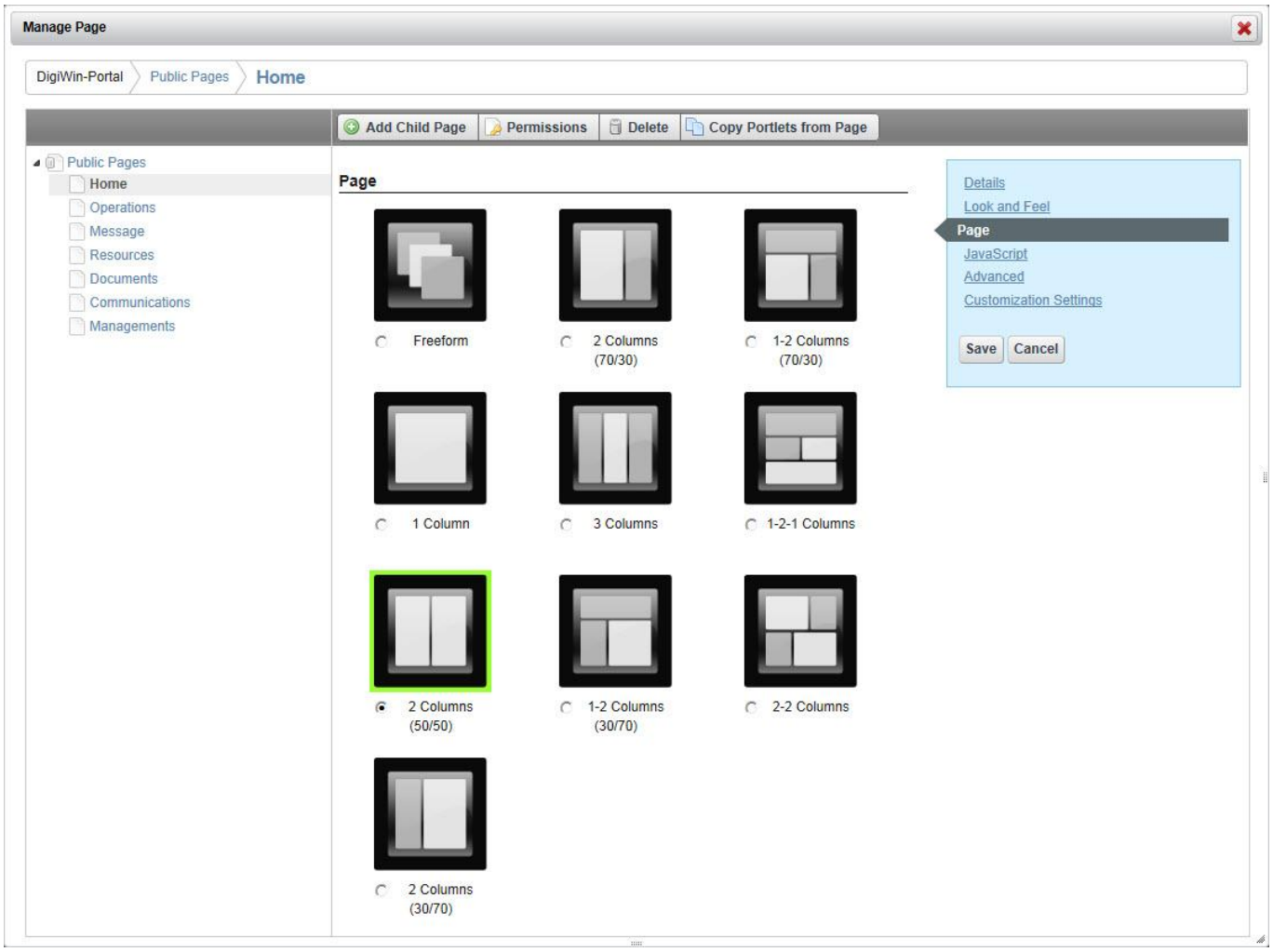
1.7.2 Search Portlet by Keyword

Enter a keyword in “Search applications” and the system will display all Portlet names containing the keyword to help find the desired Portlet quickly and conveniently.



1.8 Page Layout

Click “Manage” on the top left menu bar and select “Page Layout”. Layout patterns will appear for your choice and allow for you to set the arrangement and layout ratio of each Portlet on the page. Select the desired layout and click “Save”.

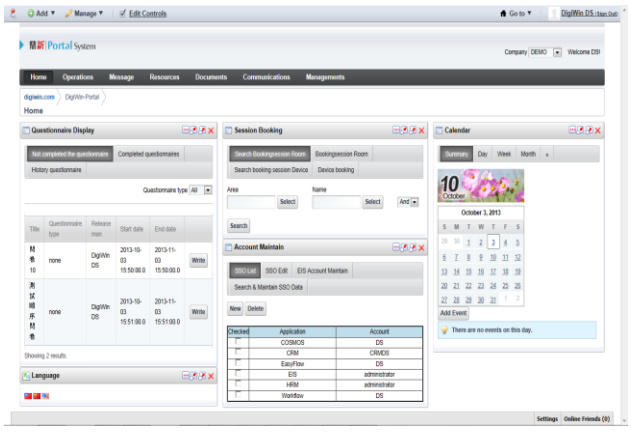


- Description of layout patterns:

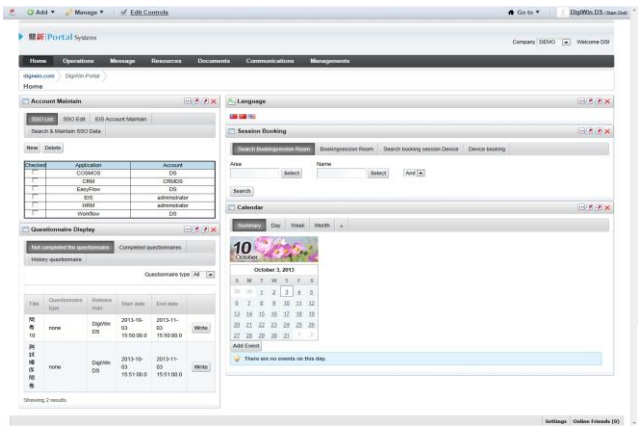
Diagram	Layout pattern	Description
	Freeform	Portlet will not be automatically arranged or aligned, but can be drawn to the designated position
	1 Column	First row: Portlet is arranged from top to bottom and occupies 100% page width
	2 Columns	Portlet is arranged in left and right columns and the figure in parenthesis shows column width ratio For example: 50/50 means the width of the left and right columns is 50% and 50%, respectively
	2 Columns	Portlet is arranged in left and right columns and the figure in parenthesis shows column width ratio For example: 30/70 means the width of the left and right columns is 30% and 70%, respectively

	2 Columns	Portlet is arranged in left and right columns and the figure in parenthesis shows column width ratio For example: 70/30 means the width of the left and right columns is 70% and 30%, respectively
	3 Columns	Portlet is arranged in left, middle and right columns, which all have equal column width
	1-2 Columns	Portlet is arranged in two rows: – First row: Portlet is arranged from top to bottom and occupies 100% page width – Second row: Portlet is arranged in left and right columns and the figure in parenthesis shows column width ratio
	1-2 Columns	Portlet is arranged in two rows: – First row: Portlet is arranged from top to bottom and occupies 100% page width – Second row: Portlet is arranged in left and right columns and the figure in parenthesis shows column width ratio
	1-2-1 Columns	Portlet is arranged in three rows: – First and third row: Portlet is arranged from top to bottom and occupies 100% page width – Second row: Portlet is arranged in left and right columns and column width ratio is 50/50
	2-2 Columns	Portlet is arranged in two rows: – First row: Portlet is arranged in left and right columns and column width ratio is 70/30 – Second row: Portlet is arranged in left and right columns and column width ratio is 30/70

For example: Switch 3 Columns to 2 Columns (30/70), and the result is shown below:

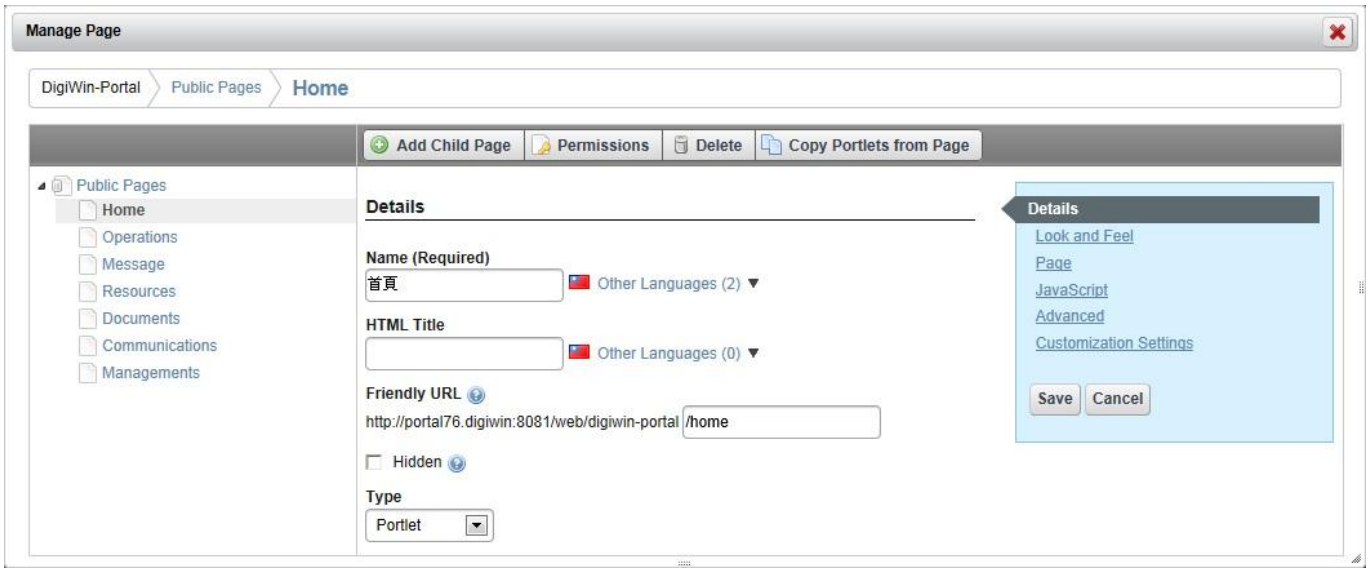


→



1.9 Management Page

Press “Manage” on the top left menu bar and then click “Page” to switch to page setting, which allows the administrator to modify page setting.
The tree menu on the left displays the structure and hierarchy of all pages for the current community. You may select the page to be set on this menu.



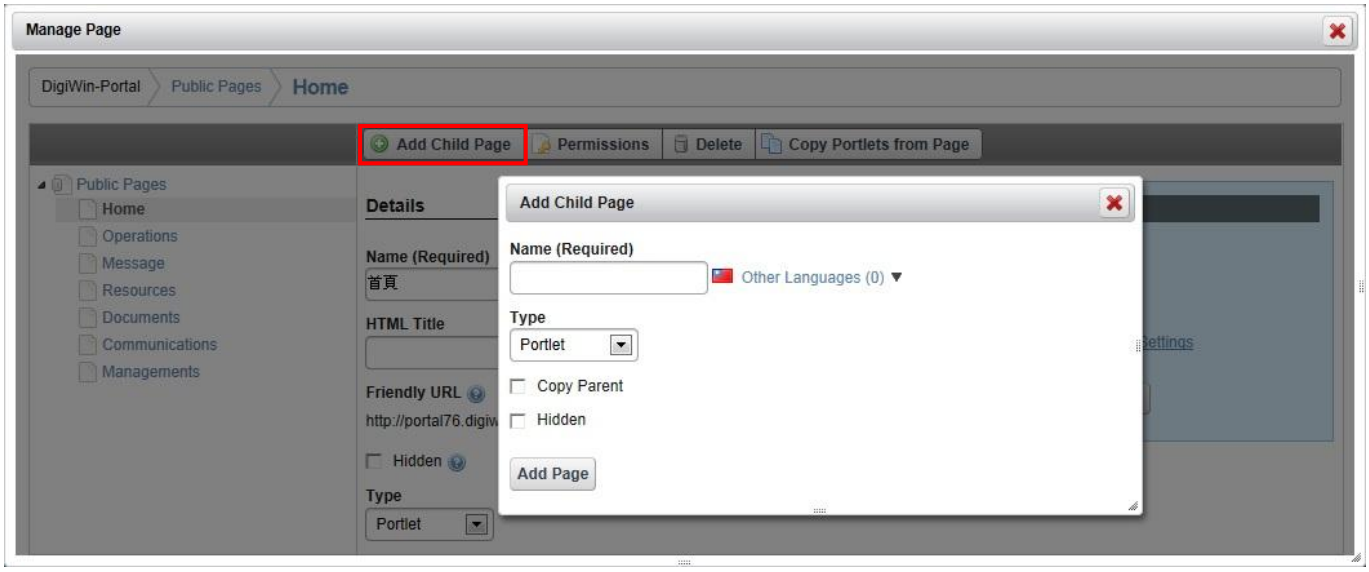
1.9.1 Page Setting

Switch the tab on the right to “Details” tab to set related data of the page, including name and type.

- Name: Name of the page. Select “Local language” to set page name in different languages
- HTML Title: HTML title: the name displayed in the title bar of the explorer while the user visits the page
- Friendly URL: Set the page’s URL
- Hidden: Check it to hide this page so that the user will not see this page while browsing
- Type: Select the type of the page and three page types are available
  - Portlet: The page can mount a Portlet panel provided by the system
  - Panel: The page can mount an application provided by the system
  - Embedded: The page can mount a web page and the plug-in web page will be embedded into Portal view

1.9.2 Subpage Administration

Switch the tab on the right to “Detail” tab. Press the buttons on the top to add, delete and set subpage permission. To adjust subpage hierarchy, drag the desired item in the menu on the left.



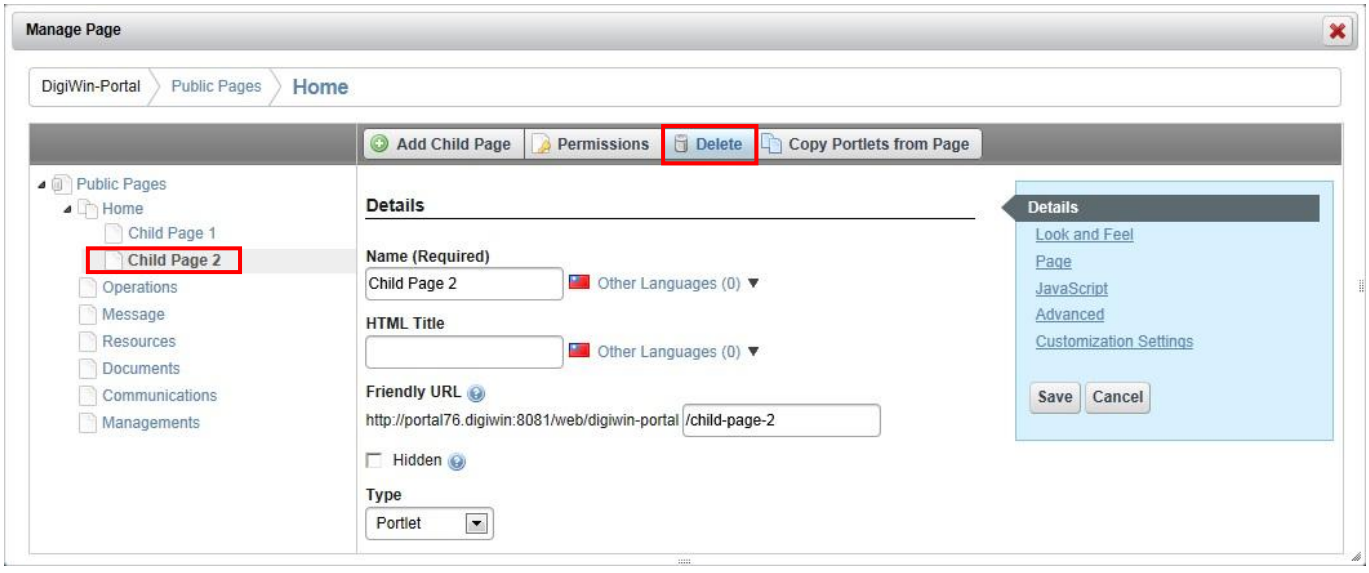
1.9.2.1 Add Subpage

After selecting the desired page, click “Add Child Page” button on the top. Enter related data and click “Add page”.

- Name: Name of the subpage
- Type: Select page type (Portlet/Embed/URL)
- Copy the upper level: Check it to copy the content of the upper-level page to the new subpage
- Hidden: Check it to hide this page so that the user will not see this page while browsing

1.9.2.2 Delete Subpage

Switch to the desired subpage and click “Delete” button to delete the subpage.



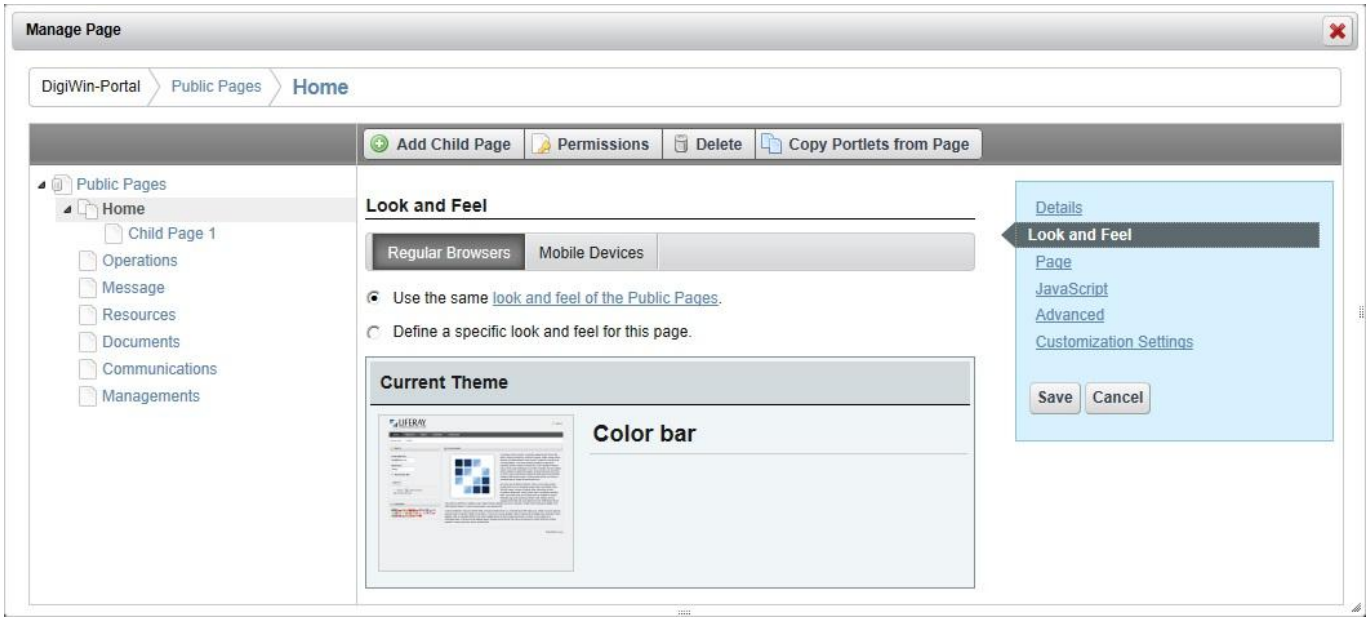
1.9.2.3 Set the Hierarchy of Subpages

In the menu on the left, drag the desired item to adjust subpage hierarchy.

1.9.3 Portal Look and Feel Setting

Switch the tab on the right to the “Look and Feel” tab and set Portal’s look and feel and theme in “Regular Browsers” and “Mobile Devices”. Click and apply a theme from “Available themes”.

Tips This setting will apply to the currently selected page only.



1.10 Control Panel

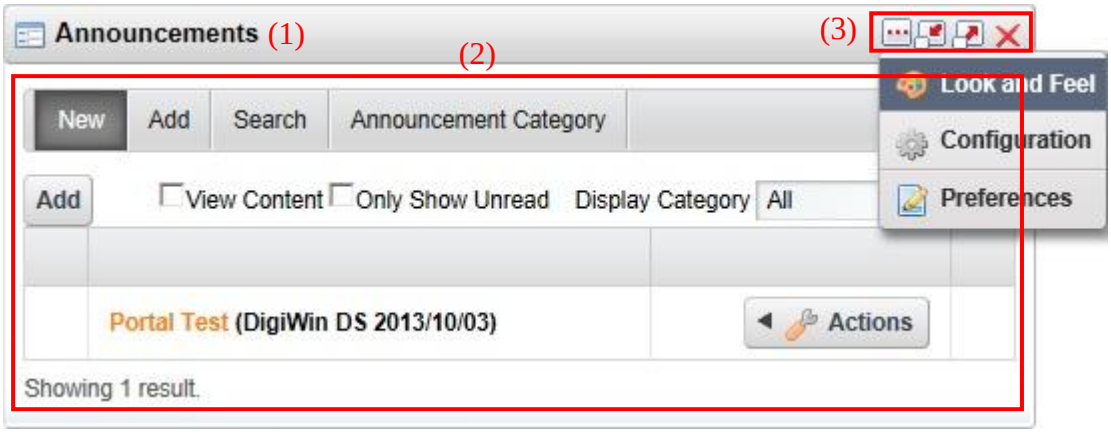
Click “Go to” on the top right menu bar, and then click “Control Panel” to access Portal’s system setting interface. Setting items include basic system settings, such as user account management , content management, server management, and user, organization and community settings.
Please refer to Chapter 9 “Control Panel”.

1.11 Portlet Operation

Portal’s functions are shown in the form of “Portlet” components. The user can put the required Portletss on the page and freely determine the position of Portlets (Please refer to “Add an application” and “Layout” of Chapter 1).

1.11.1 Description of Portlet Layout

Portlet layout includes the following areas:



(1) Portlet title area: Display the icon and function name of the Portlet

(2) Portlet content area: Display and operation area of Portlet content and data

(3) Portlet toolbar:

- More options : Click the icon button to display more options, such as: look and feel, setting and preferences
- Minimize : Click the icon button to reduce Portlet to minimal layout
- Maximize : Click the icon buttoncan to unfold Portlet to maximal layout (up to explorer window width)
- Remove : Click the icon button to remove Portlet from the view
- Restore : After minimizing Portlet , click the icon to restore it to original size (shown below)

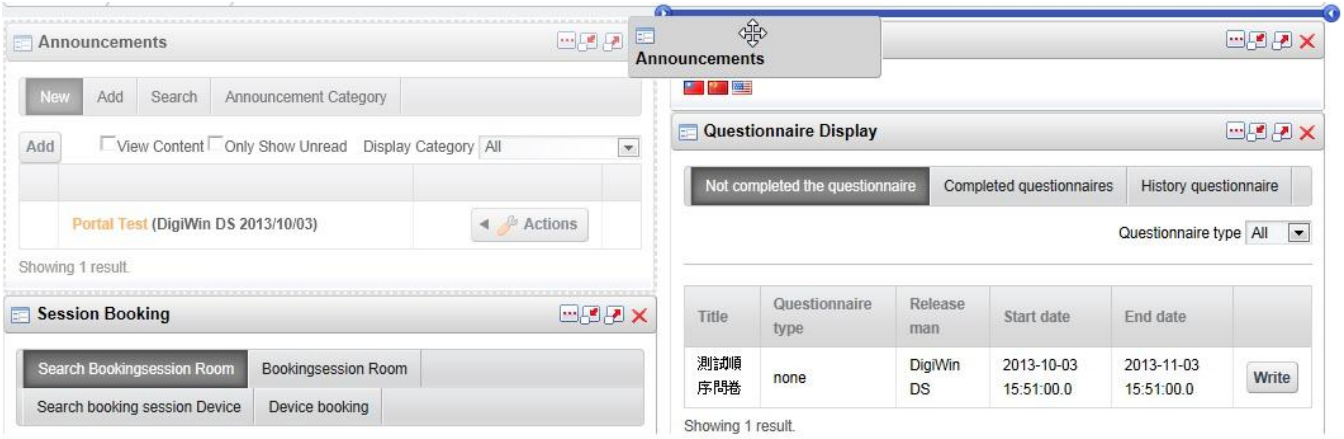
Tips Ordinary user has only three icon buttons, namely “Minimize”, “Restore” and “Maximize”.

1.11.2 Adjust Portlet Position

Tips This function applies to system administrator only.

The user can dynamically adjust Portlet’s position on the view according to his/her needs. When the cursor moves to Portlet title bar and becomes the icon, press and hold the left mouse button and drag the item to the target position, then release the left mouse button.

While dragging Portlet, the position in blue line is the position where the Portlet will be placed. The following figure shows the result of dragging “Bulletin board” from left column to right column.



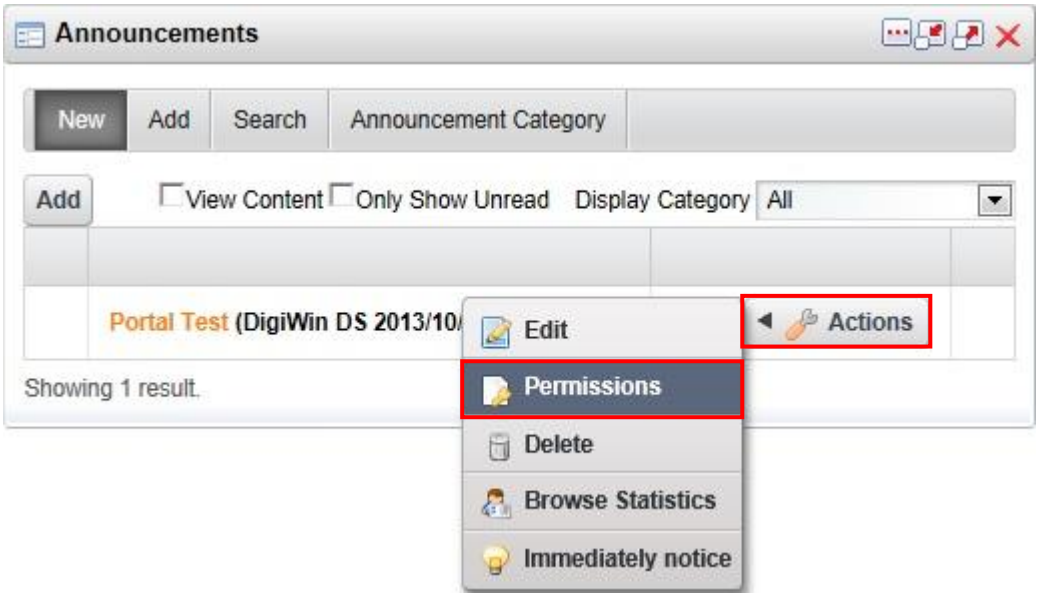
1.12 Permission Setting Method

Through the permission setting method, the user may set the permission to operation for data entities and the group level to make permission setting more flexible. Permission setting method is the same for all types of data in the Portal system. The “Announcements” is described below as an example.

1.12.1 Access Permission Setting Page

Set the permission to “Announcements” to decide which user may be permitted to view the bulletins, and the scope of permission, etc.

- Click “Actions” that follows the data entry and then click “Permissions” to access the permission setting page.



- Permission setting page is described as follows:

(1) Data entities for permission setting:
Display the data entity currently under permission setting; it is a announcement in this example.

(2) Group level of permission setting object:
Permission may be flexibly set according to "Group level". For example, "Users" means permission setting by each designated user account; "Organizations" means setting by organization only (the same permission applies to all users in this organization and one-by-one setting is not required).

Tips Different group pages include different group levels:

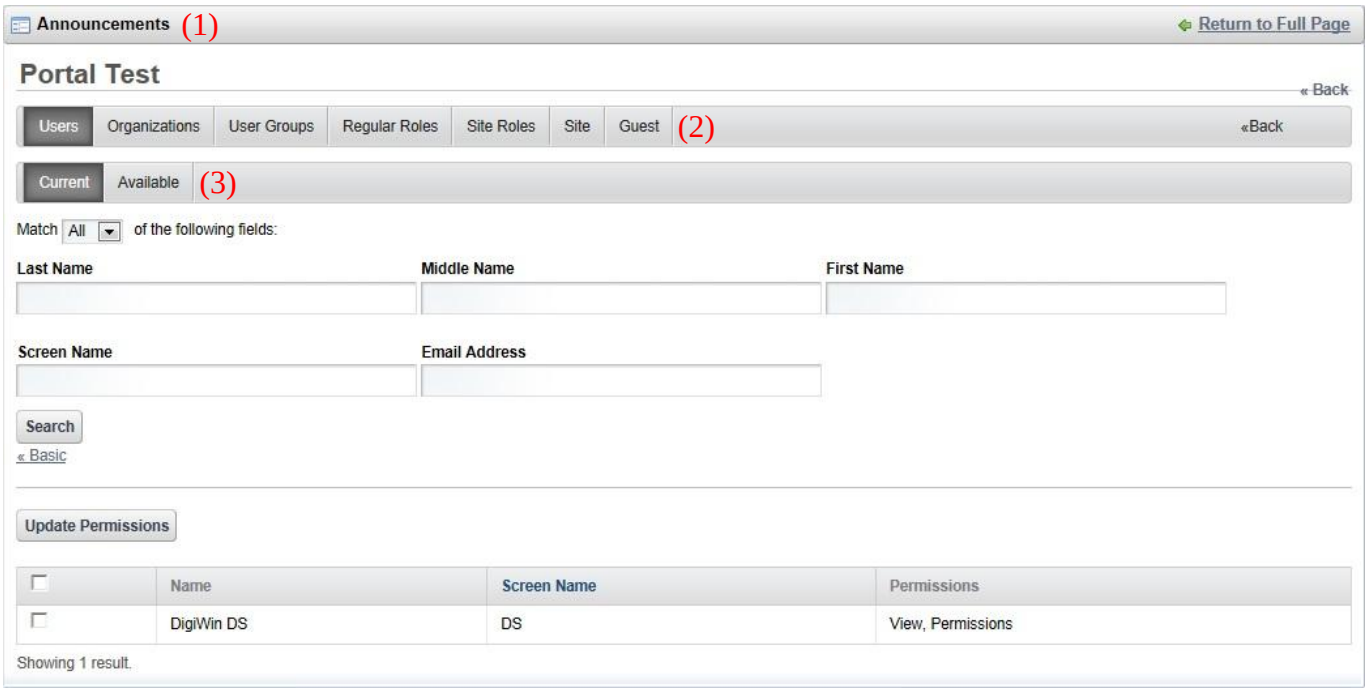
Group type	Group level (from smallest to largest)
My community	User, organization, user group, ordinary role, guest
Organization	User, organization, user group, ordinary role, organization role, organization, guest
Community	User, organization, user group, ordinary role, community role, community, guest

Tips How to select a particular level of "Group level" for permission setting? Set the permission from the largest (general) to the smallest (specific). For example, most users have the permission to "view announcement posts" but only a few users have the permission to "delete posts". The recommended setting method is: Set "Guest" or "Ordinary role" to be permitted to "View", and in "User" determine which users have the permission to "Delete".

(3) Current/available:

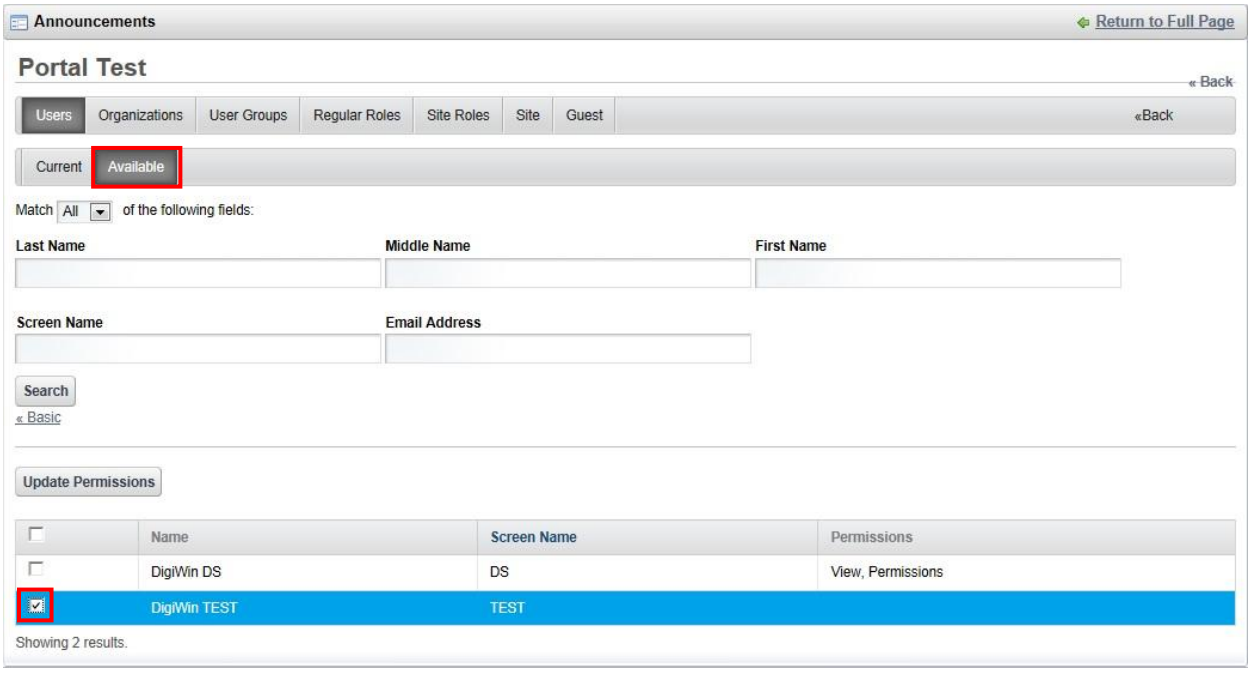
Click “Current” tab to display permission already set in the group level, and click “Available” tab to display the objects available for setting in the group level.

Take “User” group level for example. “Current” is a list of users with permission already set and the content of their permission settings while “Available” displays a list of all users in the system which can be selected for permission setting.

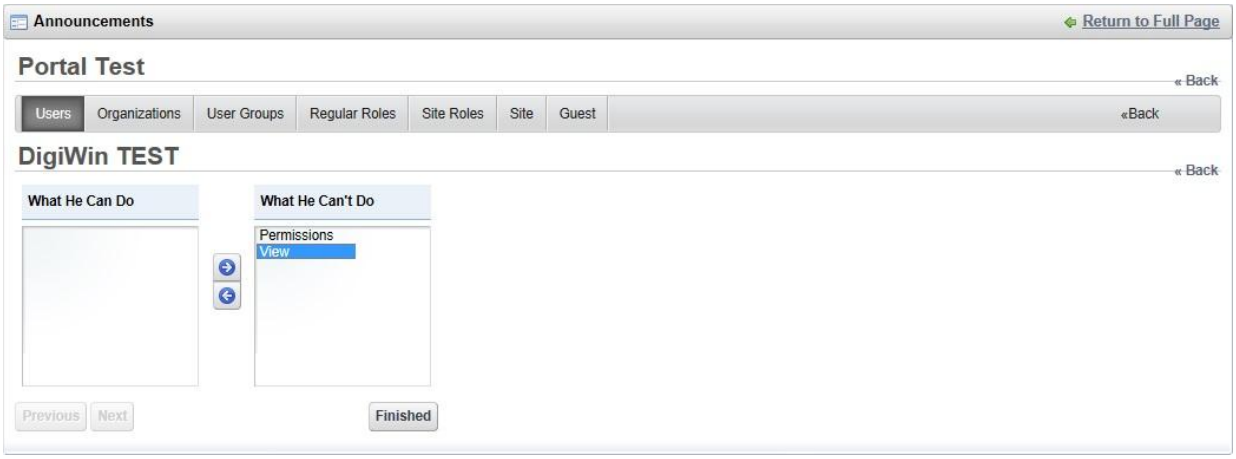


1.12.2 Add Permission Setting

- After selecting the group level, switch to the “Available” tab, check the object to set permission, and click “Update Permissions”.

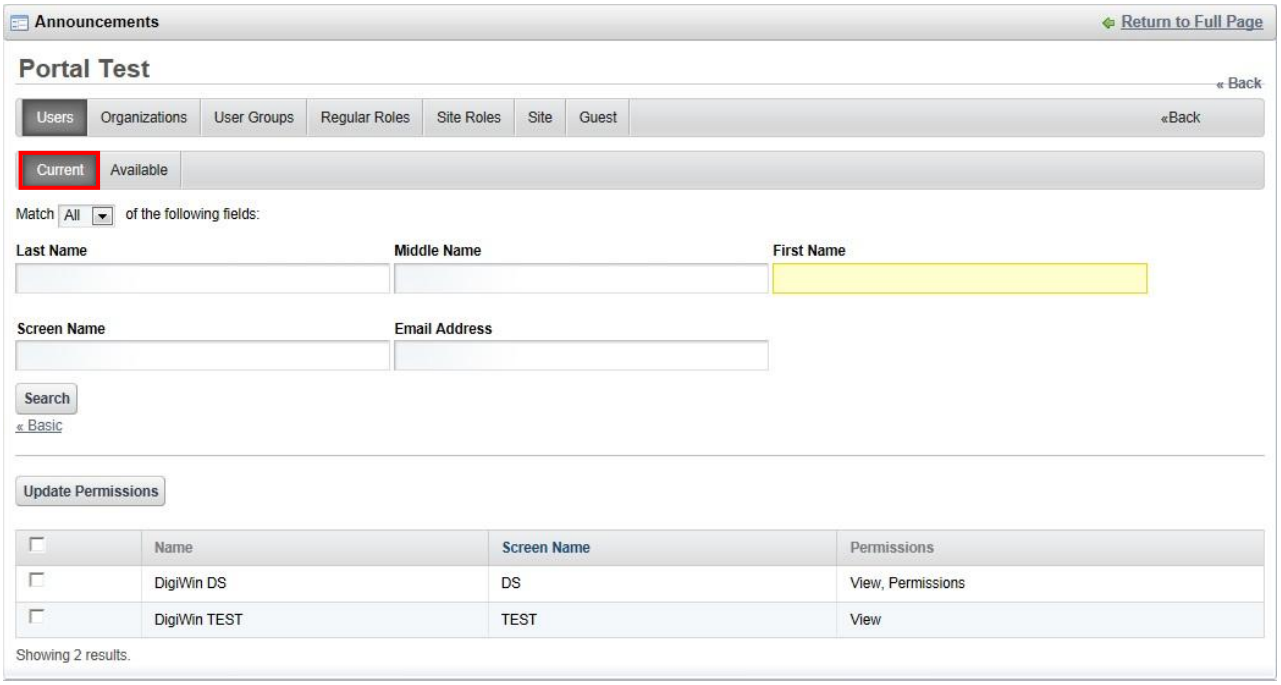


- Access the permission setting page and click or to add the permission to the "What He Can Do" on the left. After completing the setting, click "Next" to continue permission setting of the next object. After completing the setting of all objects, click "Finish".



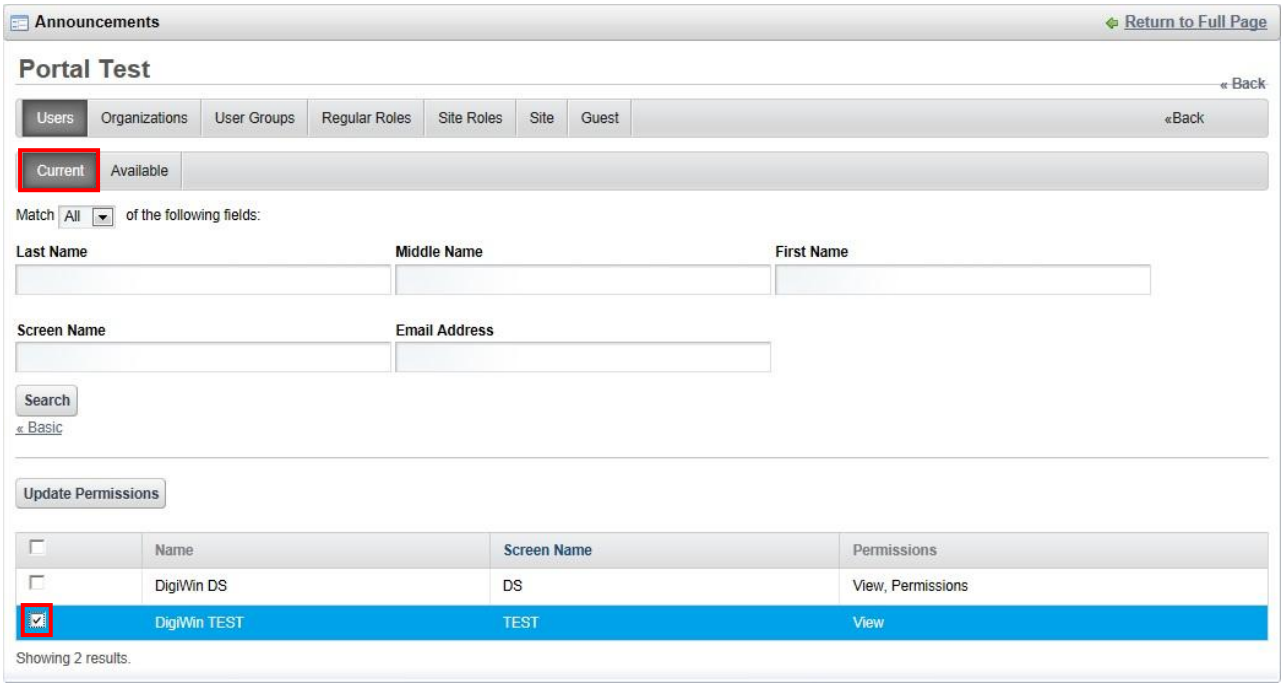
Tips If multiple objects are selected for permission setting at a time, the user needs to set permission for each object one by one.

- After completing the setting, go back to the "Current" page to view the result of permission setting.

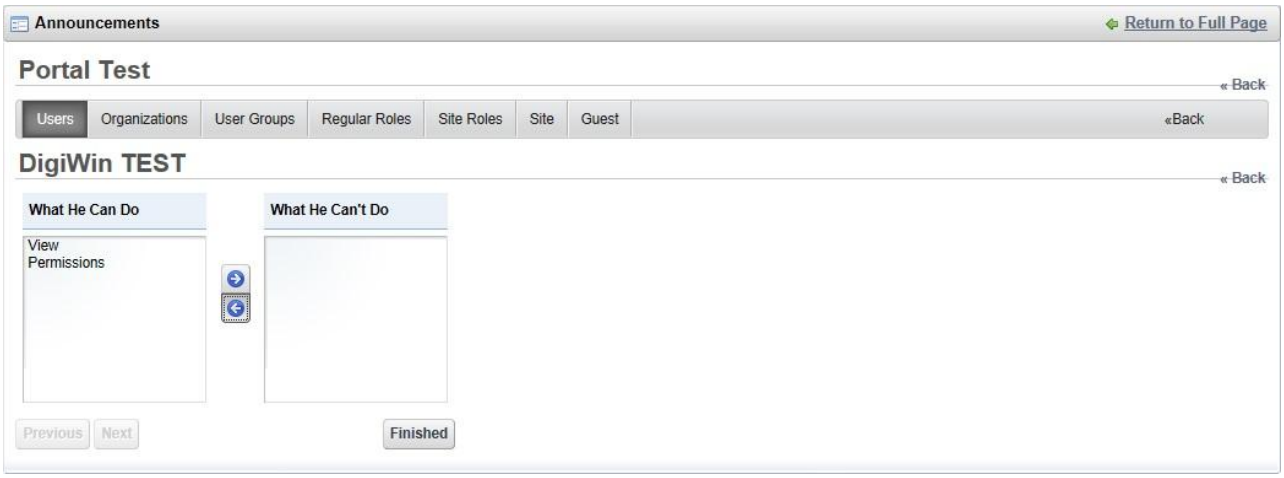


1.12.3 Change Permission Setting

After accessing the permission setting page, switch to the group level to change permission, check the desired object under the “Current” tab, and click “Update Permissions”.



- Access the permission setting page and click or to add the permission to the “What He Can Do” on the left. After completing the setting, click “Next” to continue permission setting of the next object. After completing the setting of all objects, click “Finished”.



1.13 Language Setting

1.13.1 Set Preferred Language

The user can select preferred language interface for the Portal system.

Setting method:

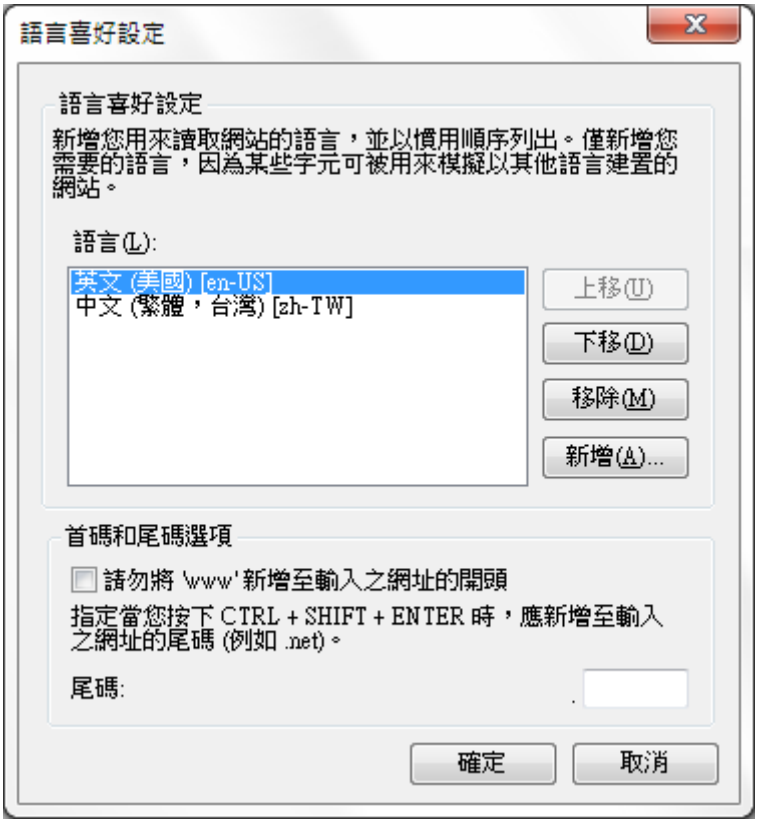
- Access “My Account” and click “Display Settings” in the menu on the right
- Access the “Display Settings” page, select the preferred language in “Language”, and click “Save”

Tips Languages currently available: Traditional Chinese, Simplified Chinese, English; for other related language setting, please refer to Chapter 7 “Language”.

1.13.2 Login Page Language

The language of Single Sign On login page is displayed based on default languages in the user’s explorer. To adjust the language, go through the following steps:

- Click “Tool” in the explorer’s toolbar and select “Internet options”
- Click “Language” to access language preference setting view, click “Add” to add a language, and move the preferred language up to the first item
- After saving the setting, refresh the page to switch to the preferred language



1.14 Log

Description of Log-related views or settings.

1.14.1 Log File Contained in Portal

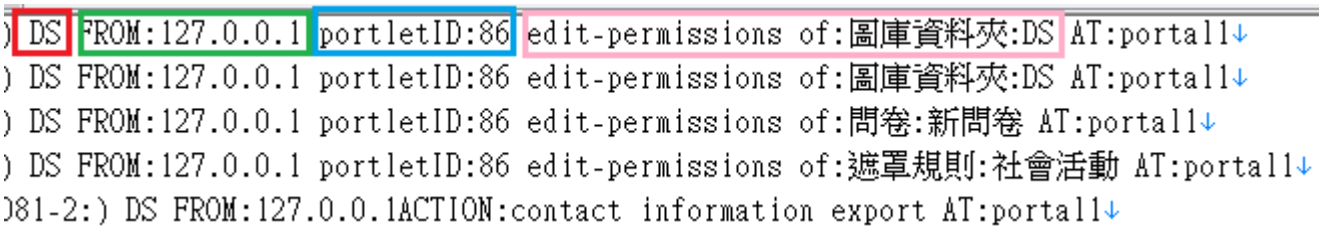
Log file records the events occurring during Portal operation, and the information such as programs executed, actions performed and resulting errors will be contained in Log file. To learn more about Portal, the administrator can view Log file. This chapter describes various Log files, such as Log file of Portal operation and Log file in response to Personal Information Protection Act.

1.14.1.1 Portal Operation Log

To view the Log of Portal operation status, please refer to \Portal-AP Server\server\default\log\server. log under DigiWin Portal installation directory.

1.14.1.2 Log Recording the "Addition, Deletion, Check, Modification, Export" of Personal Information

The Log file is generated in response to Personal Information Protection Law and records all actions that may violate Personal Information Protection Law. Please refer to \Portal-AP Server\server\default\log \Pdlog.log under DigiWin Portal installation directory


) DS FROM:127.0.0.1 portletID:86 edit-permissions of:圖庫資料夾:DS AT:portal1
) DS FROM:127.0.0.1 portletID:86 edit-permissions of:圖庫資料夾:DS AT:portal1
) DS FROM:127.0.0.1 portletID:86 edit-permissions of:問卷:新問卷 AT:portal1
) DS FROM:127.0.0.1 portletID:86 edit-permissions of:遮罩規則:社會活動 AT:portal1
)81-2:) DS FROM:127.0.0.1ACTION:contact information export AT:portal1

Field description is as follows:
User account: Record which "user" does a particular action against personal information
Source position: Record the source position of the user
Portlet: "Portlet" where the action occurs
Action: The action performed by the user against personal information, such as "addition, deletion, check, modification, export"

1.14.1.3 Log Recording the "Export" of Personal Information

The Log file is generated in response to Personal Information Protection Law and records all actions of "exporting" personal information. Please refer to \Portal-AP Server\server\default\log\EXPORTLog.log under DigiWin Portal installation directory.

1.14.2 Modify Log Setting

Currently, all Log files are written in local end by default and their default Log level is INFO. To change the default, please refer to:

1. \Portal-AP Server\server\default\deploy\ROOT.war\WEB-INF\lib\ext-impl.jar\log4j.properties under DigiWin Portal installation directory
2. \Portal-AP Server\server\default\deploy\cas-web.war\WEB-INF\classes\log4j.properties under

DigiWin Portal installation directory

1.14.2.1 Output Log to External Equipment

1. Set Kiwi SysLog Server as external equipment
2. Modify the file with the following settings and provide the IP address of the desired equipment.

2.1 File 1 modification

```
##log4j.appender.PDLog=org.apache.log4j.DailyRollingFileAppender

##log4j.appender.PDLog.File=${jboss.server.log.dir}/PDlog.log

##log4j.appender.PDLog.Append=true

##log4j.appender.PDLog.DatePattern='.'yyyy-MM-dd

##log4j.appender.PDLog.layout=org.apache.log4j.PatternLayout

##log4j.appender.PDLog.layout.ConversionPattern=ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t[%c] %m%n

##匯出PDLog到外部設備
log4j.appender.PDLog=org.apache.log4j.net.SyslogAppender
log4j.appender.PDLog.syslogHost=[IP ADDRESS]
log4j.appender.PDLog.DatePattern='.'yyyy-MM-dd-HH
log4j.appender.PDLog.layout=org.apache.log4j.PatternLayout
log4j.appender.PDLog.layout.conversionPattern=ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t%m%n

##log4j.appender.EXPORTLog=org.apache.log4j.DailyRollingFileAppender

##log4j.appender.EXPORTLog.File=${jboss.server.log.dir}/EXPORTLog.log

##log4j.appender.EXPORTLog.Append=true

##log4j.appender.EXPORTLog.DatePattern='.'yyyy-MM-dd

##log4j.appender.EXPORTLog.layout=org.apache.log4j.PatternLayout

##log4j.appender.EXPORTLog.layout.ConversionPattern=ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t[%c] %m%n

##匯出EXPORTLog到外部設備
log4j.appender.EXPORTLog=org.apache.log4j.net.SyslogAppender
log4j.appender.EXPORTLog.syslogHost=[IP ADDRESS]
log4j.appender.EXPORTLog.DatePattern='.'yyyy-MM-dd-HH
log4j.appender.EXPORTLog.layout=org.apache.log4j.PatternLayout
log4j.appender.EXPORTLog.layout.conversionPattern=ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t%m%n
```

2.2 File 2 modification

```
##log4j.appender.PDLog=org.apache.log4j.DailyRollingFileAppender

##log4j.appender.PDLog.File=../server/default/log/PDLog.log

##log4j.appender.PDLog.Append=true

##log4j.appender.PDLog.DatePattern='.'yyyy-MM-dd

##log4j.appender.PDLog.layout=org.apache.log4j.PatternLayout

##log4j.appender.PDLog.layout.ConversionPattern=[CAS]ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t[%c] %m%n

##匯出PDLog到外部設備
log4j.appender.PDLog=org.apache.log4j.net.SyslogAppender
log4j.appender.PDLog.syslogHost=[IP ADDRESS]
log4j.appender.PDLog.DatePattern='.'yyyy-MM-dd-HH
log4j.appender.PDLog.layout=org.apache.log4j.PatternLayout
log4j.appender.PDLog.layout.conversionPattern=ProductName:Portal\tDate:%d{yyyyMMdd}\tTime:%d{HH:mm:ss}\t%m%n
```

3. Restart Portal

2. Enterprise Management

2.1 Announcement

Use the platform to release new messages and set objects that have the permission to browse bulletins.

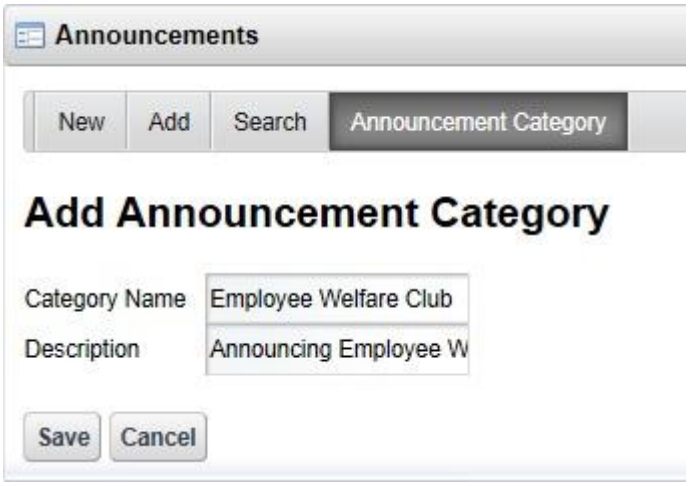
2.1.1 Control Announcement Category

Tips This function applies to system administrator only.

Click “Announcement Category” tab to display the bulletin types already created.

2.1.1.1 Add Announcement Category

Click “Add” to open the page of add bulletin type. After entering related data, click “Save” to complete the addition of bulletin type.



- Category Name: Enter the name of bulletin type
- Description: Enter the description of bulletin type

2.1.1.2 Control Announcement Category

Click “Actions” that follows the data entry of “Type” to control bulletin type.

- Edit: Click “Actions” on the right of data entry and then select “Edit” to access edit page. For data editing method, please refer to “Add Announcement Category”
- Delete: Click “Actions” on the right of data entry and then select “Delete” to delete the bulletin type. After such deletion, bulletins that belong to this bulletin type will be listed as “Undefined Category”. Any type with bulletins created cannot be deleted

2.1.2 Browse Announcements

2.1.2.1 Browse Recent Announcements

"New" of bulletin board display the latest bulletins (sorted by date).
Only some bulletins are displayed here. Click "More" on bottom right corner to view all bulletins. Click (more) at the end of a bulletin or directly click the data entry to view the complete bulletin.

Tips Unread bulletins will be displayed in boldface.

2.1.2.2 Browse Announcements by Announcement Category

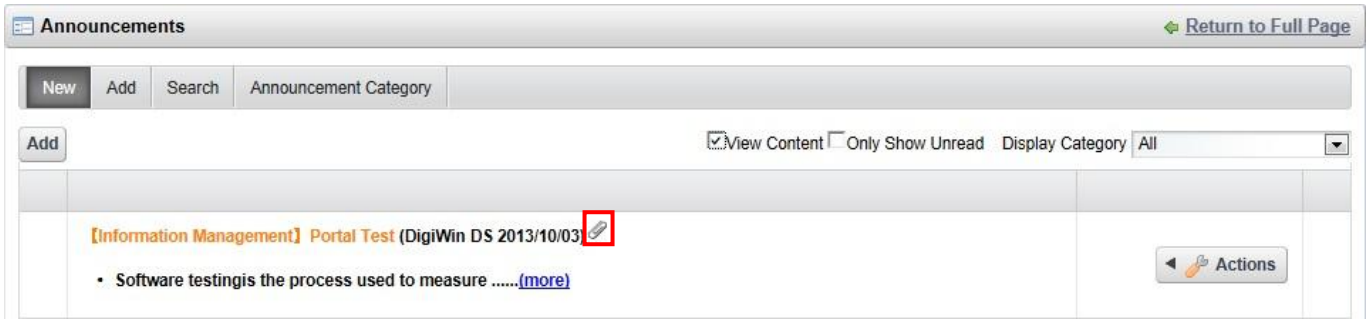
Select "Display Category" to browse bulletins by announcement category.
Select "All" to browse all bulletins (regardless of type), and select "Undefined Category" to browse bulletins without type setting.

2.1.2.3 Browse Unread Announcements

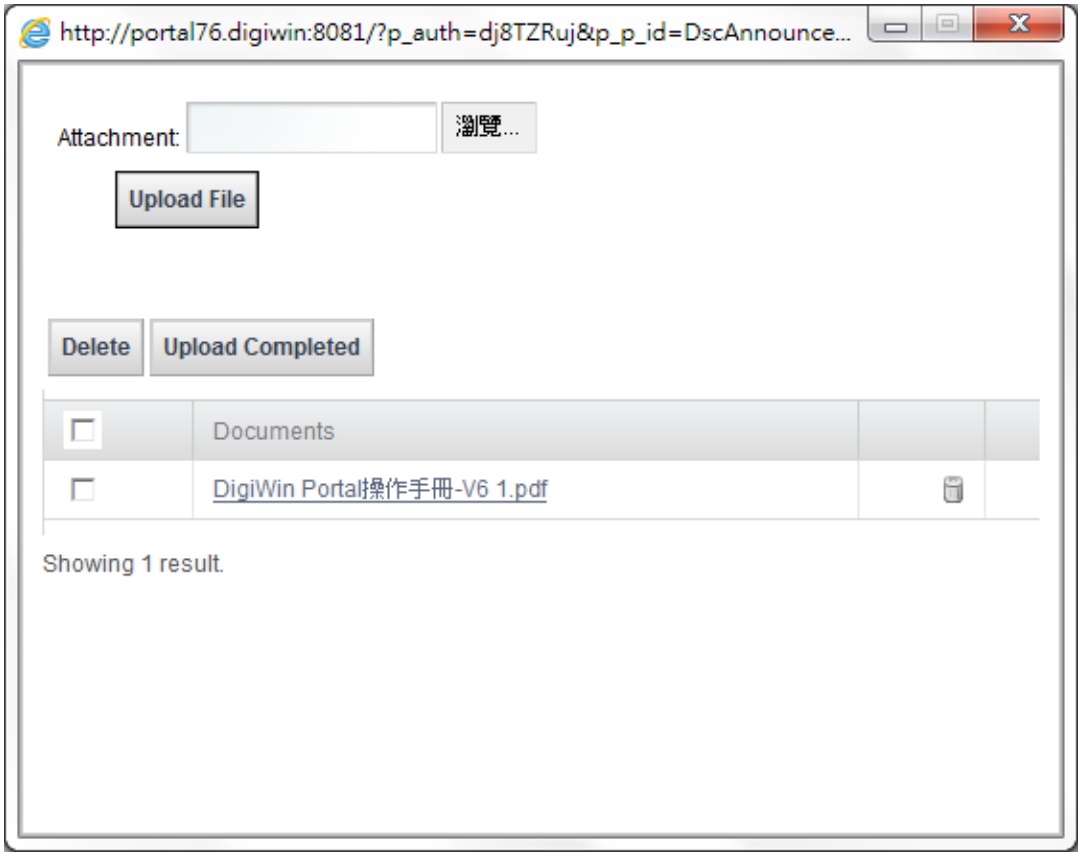
For bulletins unread by the user, the system will display them in boldface. Check "Only Show Unread" to display all unread bulletins.

2.1.2.4 View Bulletin Attachments

If a bulletin has attachments, (paper clip) icon will be shown at the end of bulletin title. Click the icon to open the attachment list.



Click the name of attachment file to download the attachment.

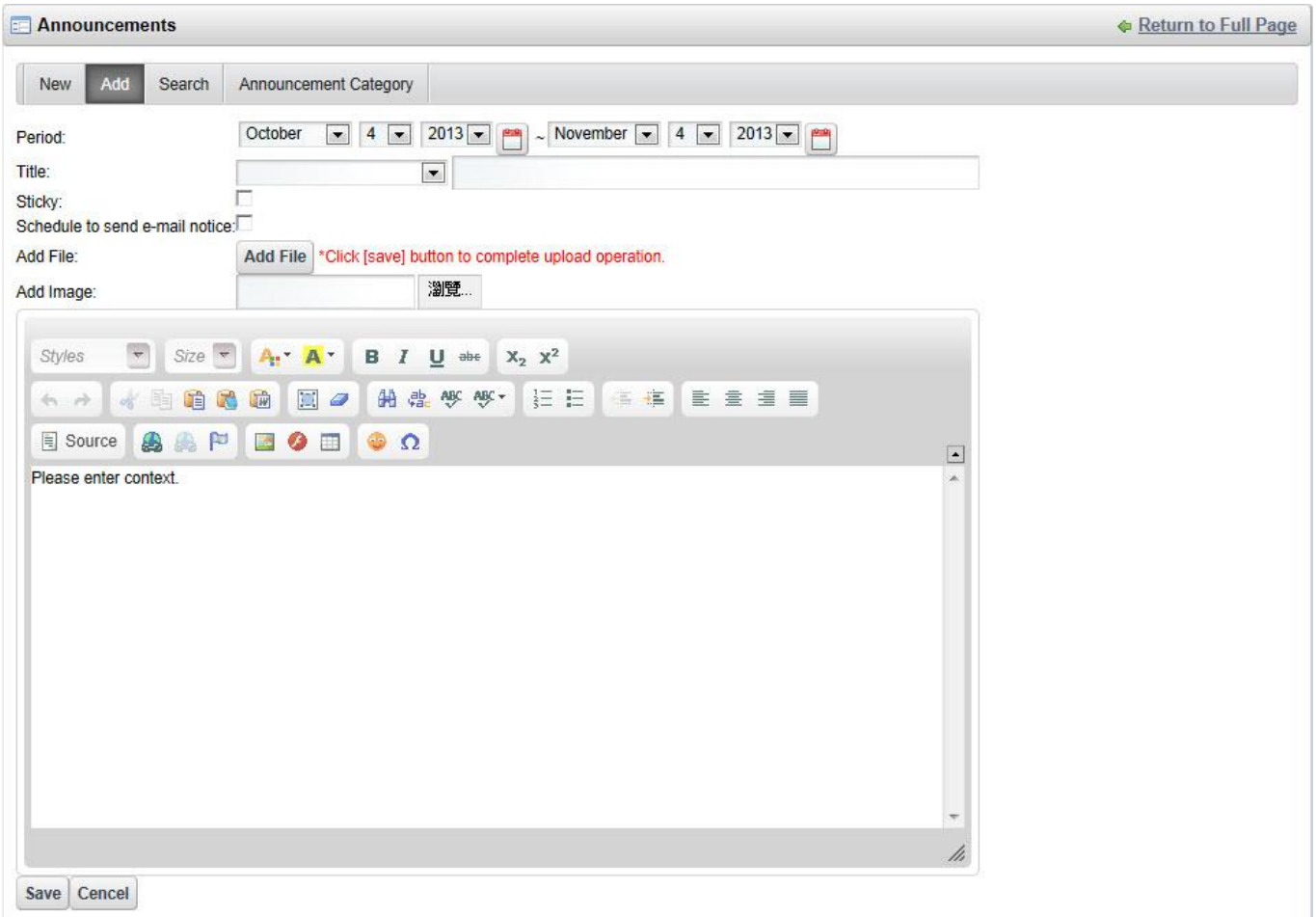


2.1.3 Add Announcement

Tips This function is for use only by a system administrator or permitted users.

Tips After adding a bulletin, be sure to set the “Bulletin viewing permission” and select the objects that are allowed to view this bulletin. Otherwise, only the creator of the bulletin can view this bulletin.

Click “Add” or “Add” tab to access the view of add announcement. After entering bulletin-related data, click “Save” to complete the addition.



- Period: Set start date and end date of bulletin release
- Announcement category: Select the category of announcement
- Title: Enter the title of bulletin
- Sticky: Check this item to display the bulletin on the top of Announcements. Sticky period means that the bulletin will be on the top until the period expires
- Schedule to send e-mail notice: Check this item to automatically schedule and send bulletin E-mails to desire objects
- Add File: Click “Add File” to upload bulletin attachment
- Add Image: Uploaded picture will precede the bulletin. Click “Browse…” at the end of the field to select a picture file
- Bulletin details: Enter the bulletin details

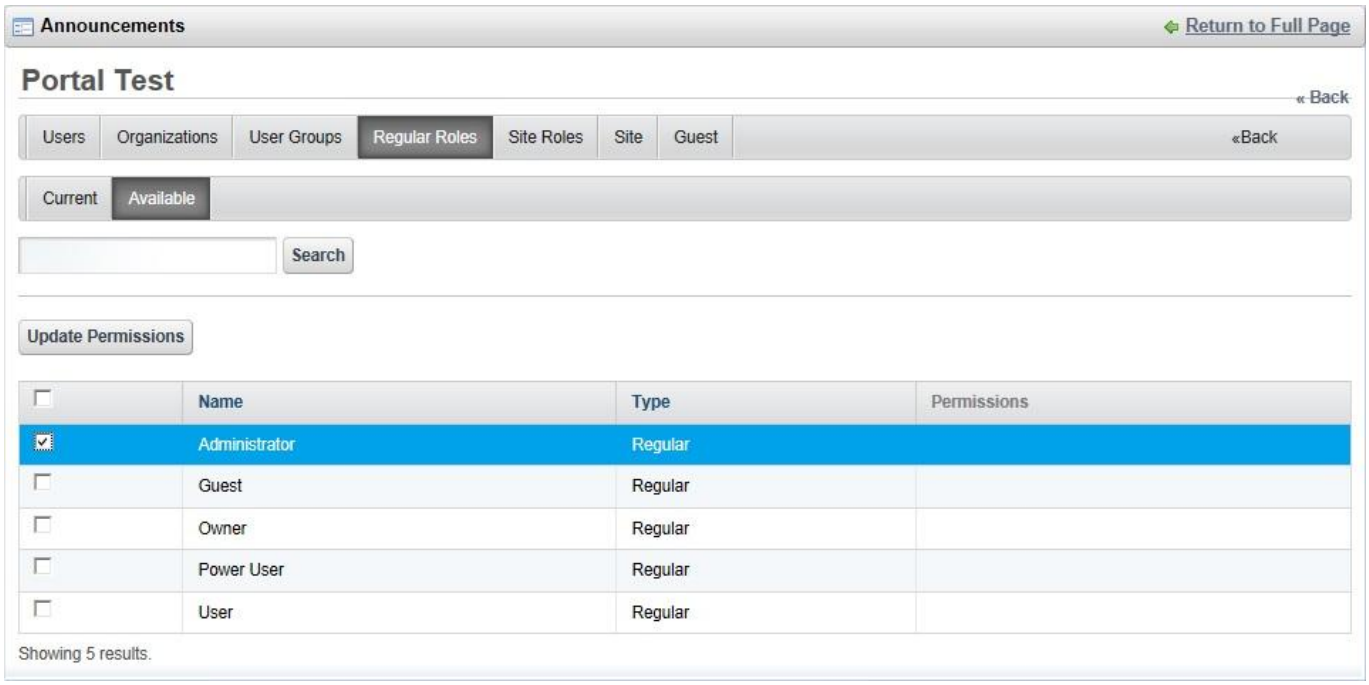
2.1.4 Set Announcement Viewing Permission

Click “Actions” that follows the data entry of “Announcement” and then click “Permissions” to set the announcement viewing permission.

【Information Management】 Portal Test (DigiWin DS 2013/10/03)
• Software testingis the process used to measure .....(more)
Actions
【Employee Welfare Club】 Activities of Employee Welfare Committee (DigiWin DS 2013/10/04)
• Annual activities to enhance employee relations.....(more)
Actions

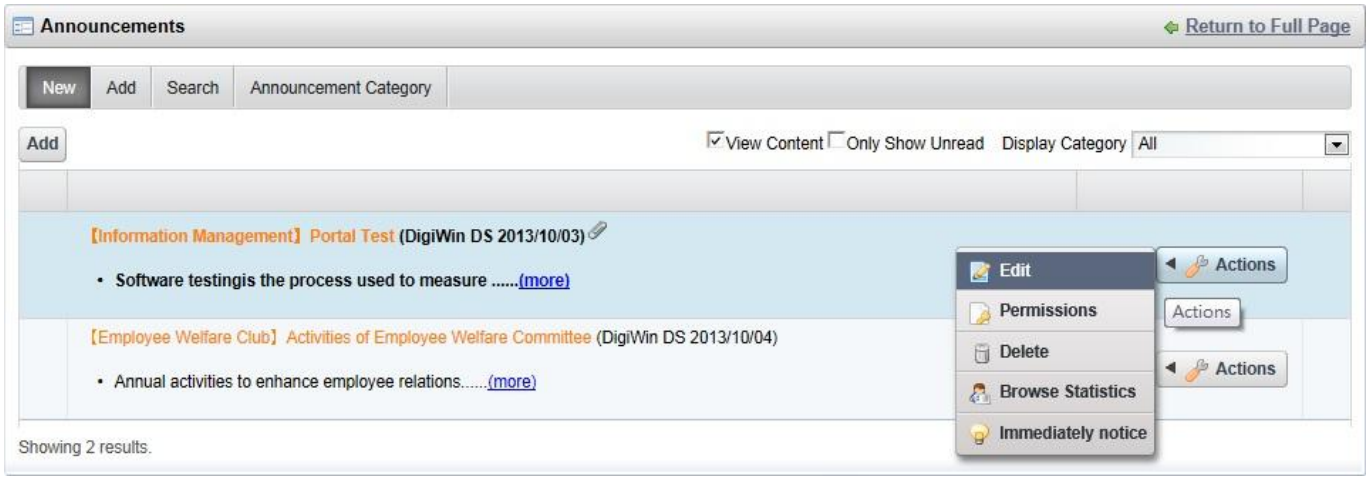
After accessing the permission setting view, set permission by seven group levels: Users, Organizations, User Group, Regular Roles, Site Roles, Site, Guest.
Setting method: To switch a group level, under the “Available” tab check the object to view this bulletin and then click “Refresh permission”.

Tips Different group levels may be set simultaneously. For example, select “Administrator” for “Regular Roles” and then set “Users” by selecting user account “John”. As a result, both “Administrator” and John can read this announcement, while the others cannot.



2.1.5 Control the Bulletin Announcement

Click “Actions” that follows the data entry of “Announcement” to control the bulletin.



- Edit: Click “Actions” on the right of data entry and then select “Edit”. For data editing method, refer to “Add Announcement”
- Permission: Click “Actions” on the right of data entry and then select “Permissions” to access the permission setting page

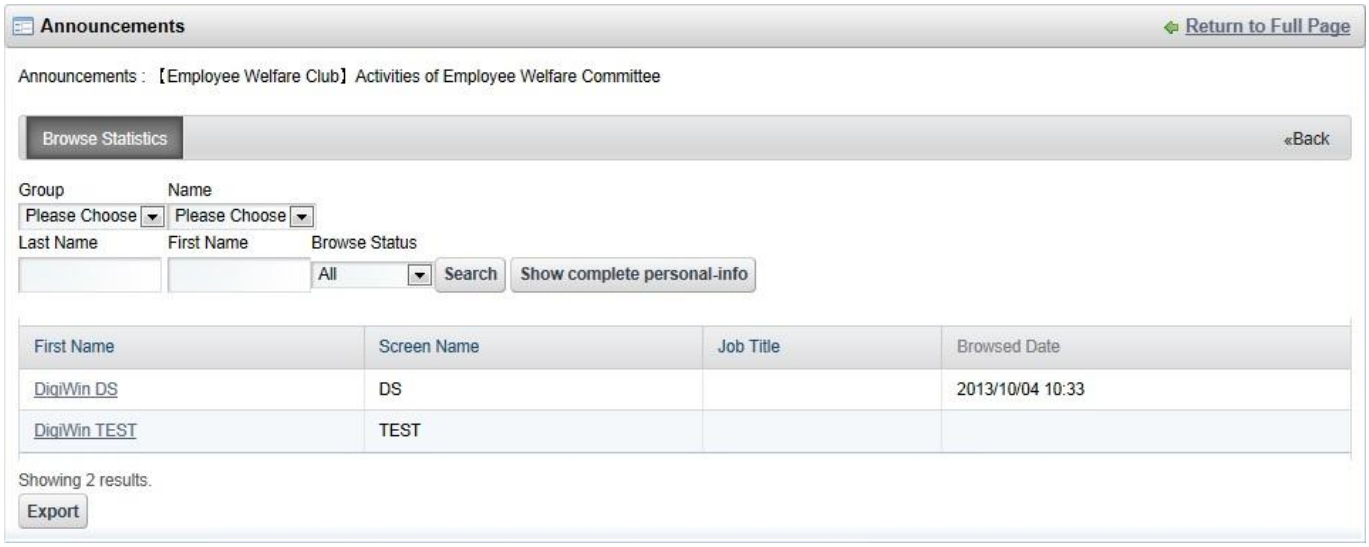
Permission setting:

Data entity	Bulletin data
Permitted to	View, Permissions

- Delete: Click “Actions” on the right of data entry and then select “Delete” to delete the data
- Browse Statistics: Click “Actions” on the right of data entry and then select “Browse Statistics” to know whether relevant personnel have browsed this bulletin. Please refer to the section “Announcement browse statistics”
- Immediately notice: Click “Actions” on the right of data entry and then select “Immediately notice” to send mail to users permitted to browse

2.1.6 Announcement Browse Statistics

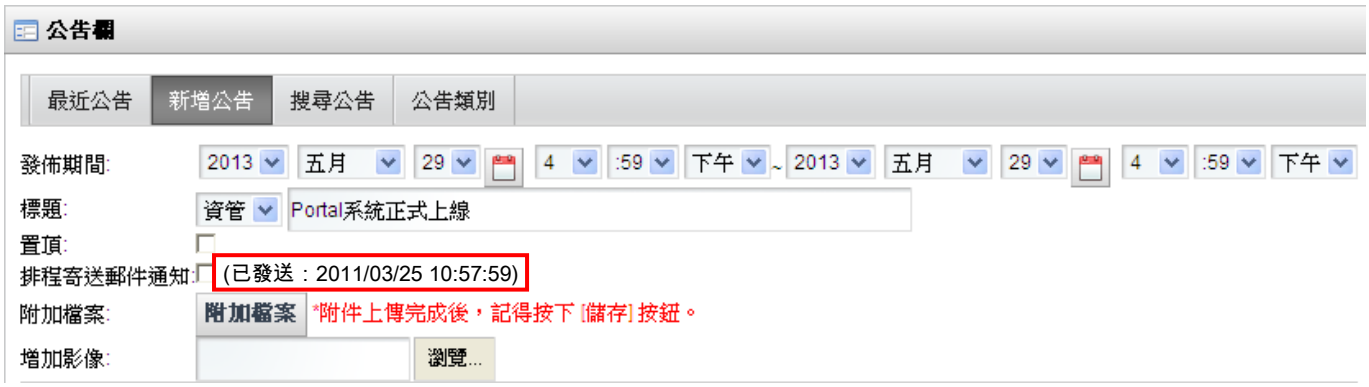
It enables the user to know whether relevant personnel have browsed this announcement.
After accessing the "Announcement" list, click "Actions" on the right and then select "Browse Statistics" to access the page of announcement browse statistics.



- The figures shown at the end of bulletin title on the top are the number of personnel who may browse this bulletin and the number of personnel who have browsed this bulletin.
- Enter query conditions and click "Search", and the results that meet such conditions will be displayed below.
- For any person on the name list, "Browsed Date" with data means the user has browsed this announcement; the blank means the user has not browsed it.
- Click "Export" to export the browsing status of this announcement.

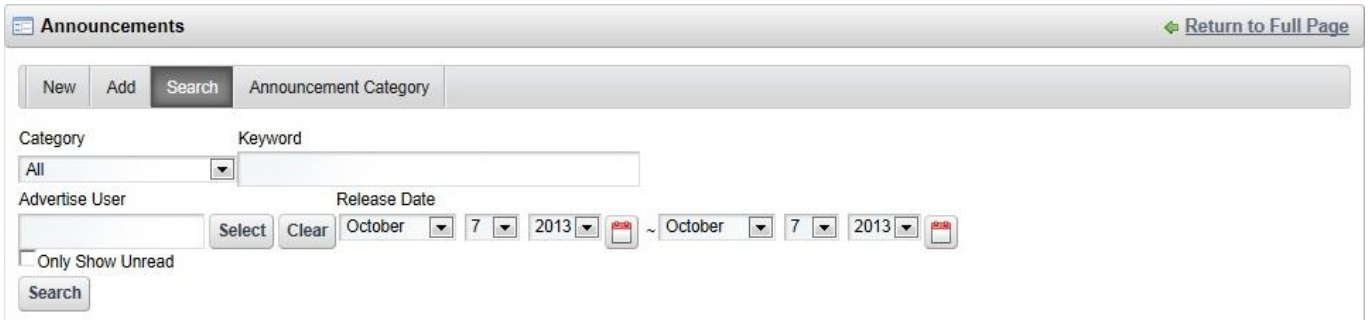
2.1.7 View the Time of Announcement Mail Notification

If the schedule to send e-mail notice is set for Announcements, you can take the following steps to view the time the system sent the last mail:
Click "Actions" that follows the data entry of "Announcement" and then select "Edit" to access the edit page of the bulletin. If mail notification of the bulletin is already sent, "Time sent" will be shown.



2.1.8 Search Announcement

Click “Search” tab, enter query conditions and then click “Search”. The search results will be shown below. Search conditions available include:



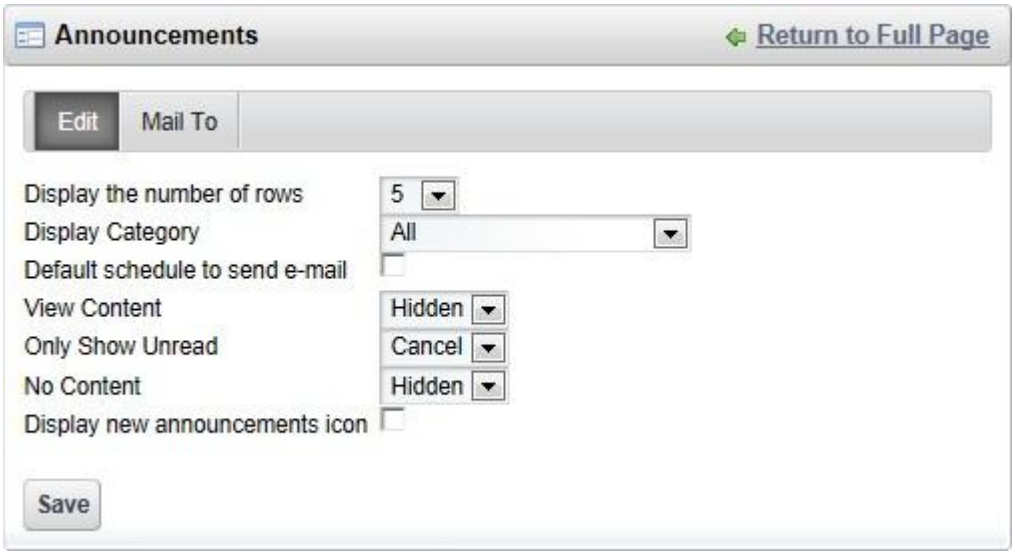
- Category: Select the type of announcement to search (All/Undefined Category/<Announcement categories already created…>)
- Keyword: Enter the keyword of bulletin title or bulletin text to search
- Advertise User: Enter the person who released the bulletin to search
- Release Date: Enter the release period of the bulletin to search, including any date within the bulletin’s release period
- Only Show Unread: Check this item to display unread bulletins only

Tips If several search conditions are set, only data that meet all those conditions will be displayed

2.1.9 Announcements Preferences

Tips This function applies to system administrator only.

Click “Preferences” in the announcements toolbar to access the preferences page.



2.1.9.1 Set Announcements Display Count

Set the maximum number of bulletins to be displayed by Announcements under general mode.
Setting method: After accessing the “Preferences” page of bulletin board, select “Display the number of rows” and then click “Save”.

2.1.9.2 Default Announcements Display Category

Set the type of bulletin to be displayed by default in announcements. After accessing the announcements page, the user will first see the preset type of bulletin. Then the user may switch to other bulletin types.
Setting method: After accessing the bulletin board’s “Preferences” page, select “Display Category” of the bulletin and then click “Save”.

2.1.9.3 Default E-mail Notification Scheduling

Set whether the system will send bulletin E-mail notifications. While a bulletin is being added, the default value will be automatically displayed. The user may change this setting based on the nature of the bulletin (The changed setting applies to such bulletin only. When another bulletin is added, the default setting will be first displayed).
Setting method: After accessing the bulletin board’s “Preferences” page, if it is necessary for the system to send bulletin E-mail notifications automatically, please check “Default schedule to send e-mail”.

2.1.9.4 View Content

Set whether the announcements hides bulletin text.

2.1.9.5 Only Show Unread

Set whether the bulletin board displays unread bulletins only.

2.1.9.6 No Content

Set that the bulletin board will display a hint if no text exists.

2.1.9.7 Display New Announcements Icon

Set whether the bulletin board page displays a hint icon of new bulletin. If it is checked, the user may select “Effective Days” to ensure there will be new bulletin hint within 1~30 days after the release date of bulletin, and the default setting is 7 days.

2.1.10 Portlet Permission Setting

Click “Setting” in the Portlet toolbar and then select the “Permission” tab to access the permission setting page.

Permission setting:

Data entity	Bulletin Board Portlet
Permitted to	Add Announcement, Add to Page, Configuration, Do not apploy datamask, Permissions, Preferences, View

3. Individual Assistant

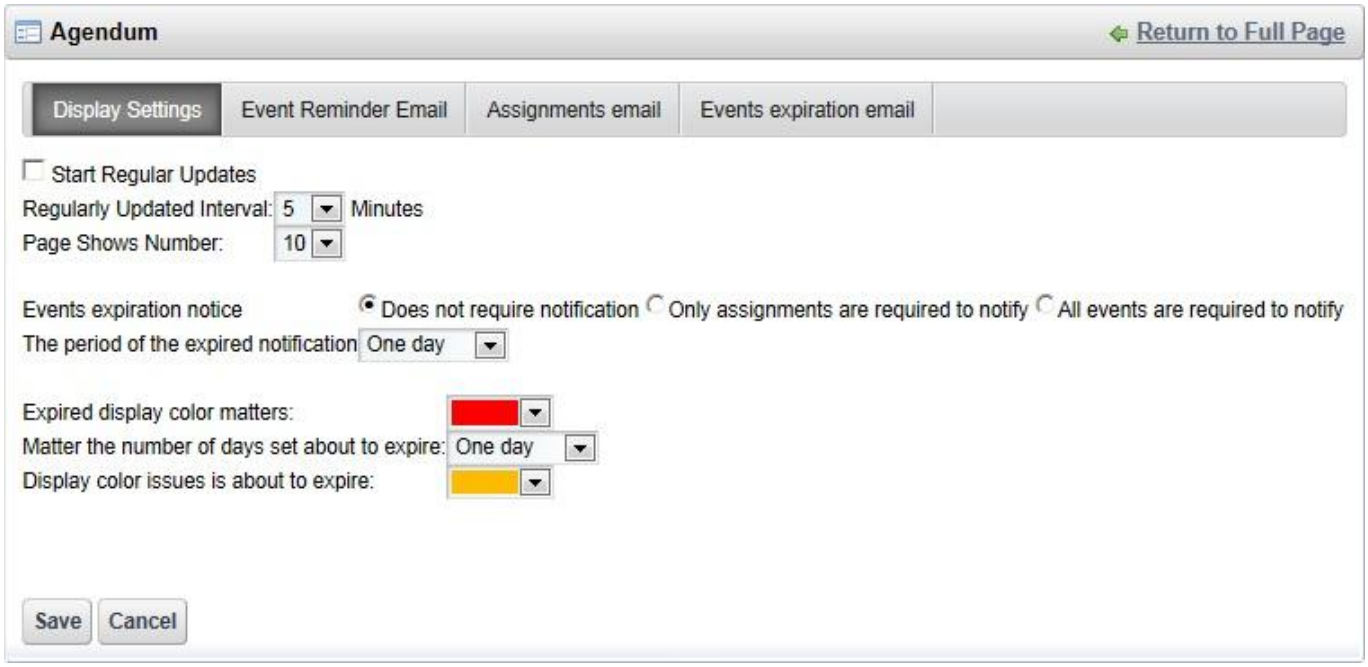
All functions in this section are for use only by a system administrator.

3.1 Agendum

It enables the user to create and manage agendum list. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.1.1 Agendum Display Preferences

Click “Preferences” in the agendum toolbar to access the “Display setting” of agendum page. After finishing related settings, click “Save”.

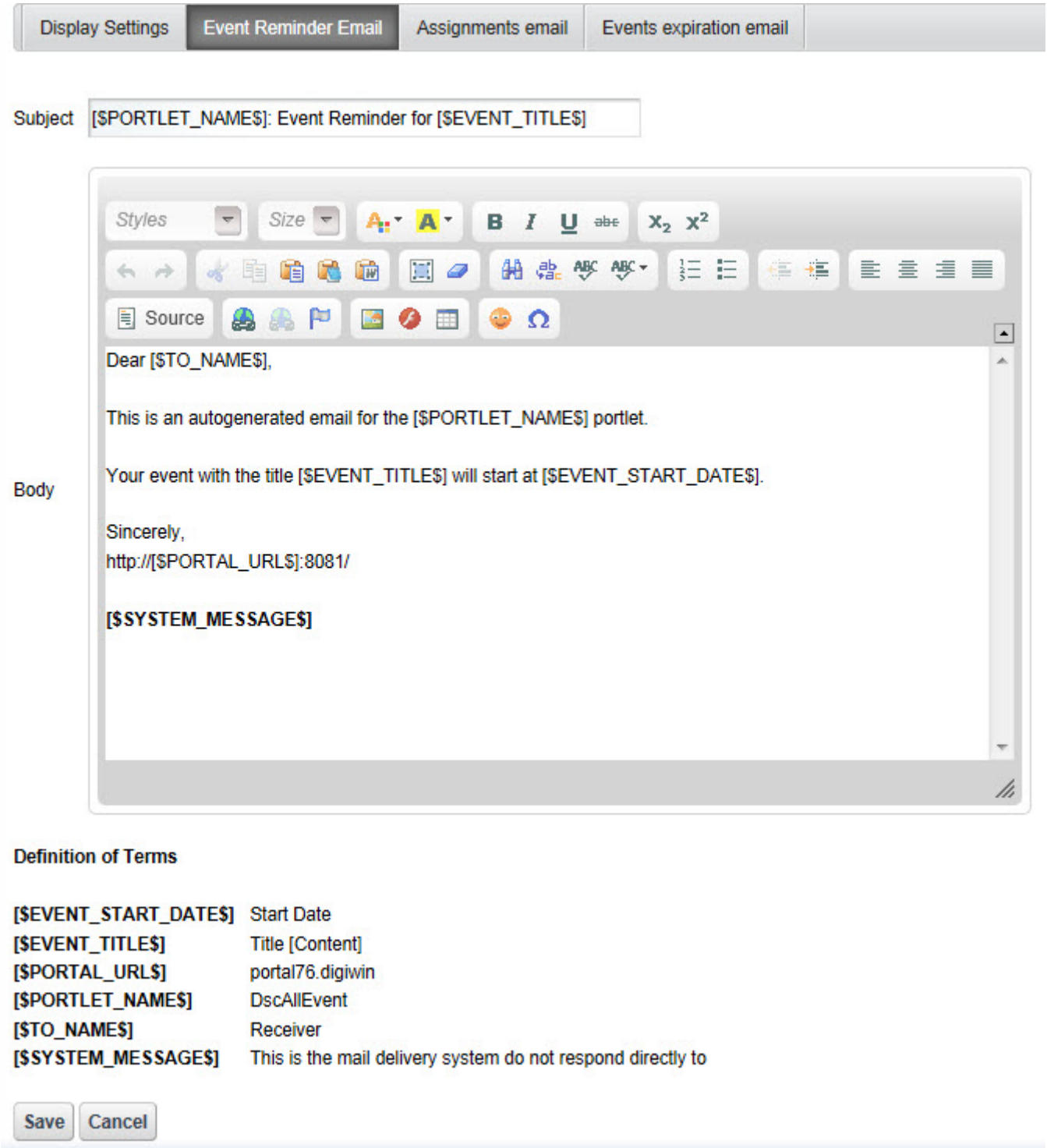

Agendum
Return to Full Page
Display Settings
Event Reminder Email
Assignments email
Events expiration email
Start Regular Updates
Regularly Updated Interval: 5 Minutes
Page Shows Number: 10
Events expiration notice
Does not require notification
Only assignments are required to notify
All events are required to notify
The period of the expired notification One day
Expired display color matters:
Matter the number of days set about to expire: One day
Display color issues is about to expire:
Save
Cancel

- Start Regular Updates: Check this item to automatically refresh the agendum page periodically
- Regularly Updated Interval: Set the interval time of automatic refresh of agendum page in the unit of minutes (5/10/15/20/30/45/60)
  ※Check “Activate periodical refresh” to make the setting effective.
- Page Shows Number: Set the maximum number of agendum entries to be displayed under general mode (5/10/20/30/50/75)
- Events expiration notice: Set notification mode of expired events (Does not require notification/Only assignments are required to notify/All events are required to notify)
- The period of the expired notification: Set the range of notice period of expired event (One day/Two days/Three days)
- Expired display color matters: Set the color of text display of expired event
- Matter the number of days set about to expire: Set the reminder period for an event about to expire (One day/Two days/Three days/Four days/One week/Two weeks)
- Display color issues is about to expire: Set the color of text display of an event about to expire

3.1.2 E-mail Notification Format Setting

Click “Preferences” in to-do toolbar to access the preferences of agendum page. After finishing related settings, click “Save”.

3.1.2.1 Event Reminder Email



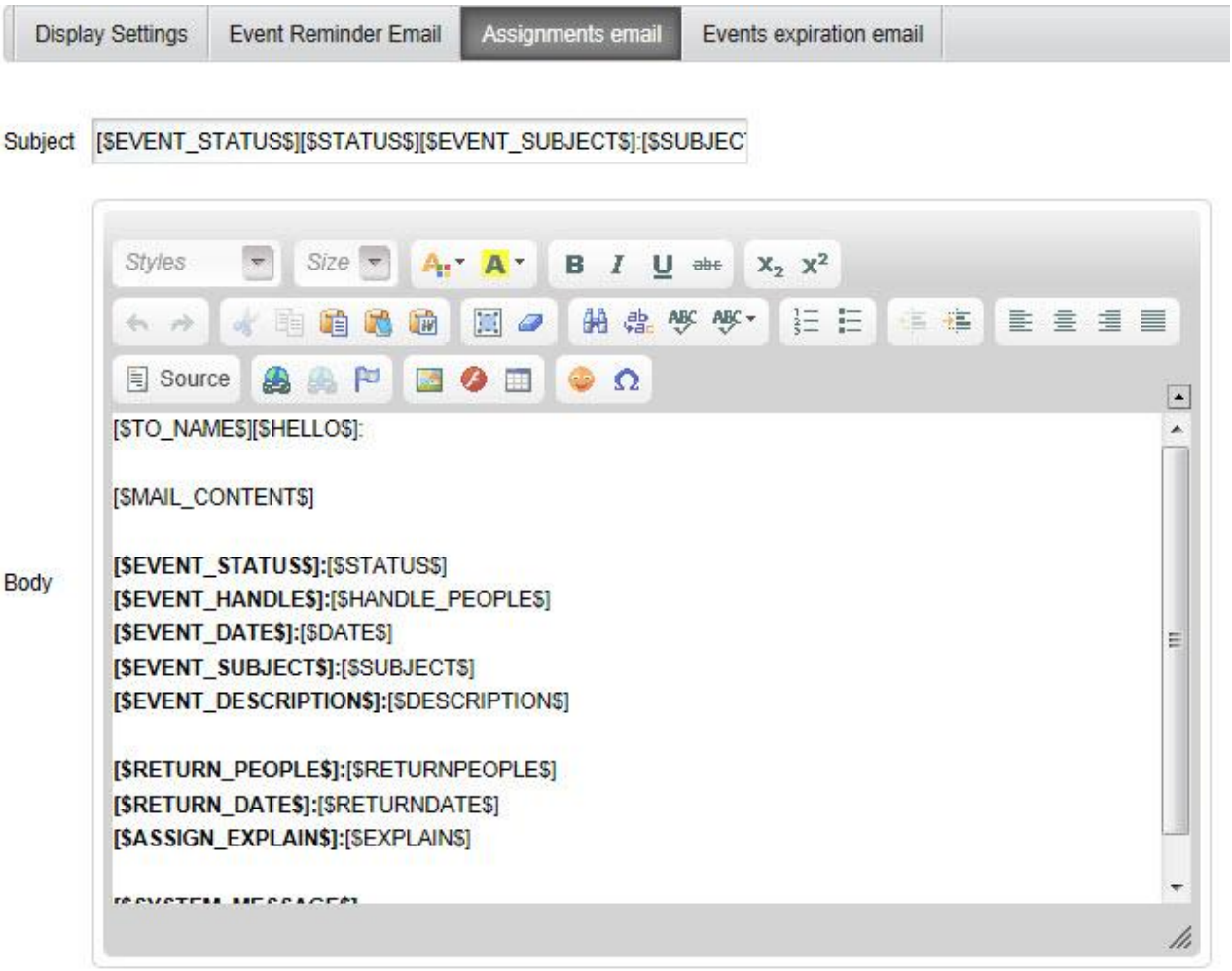
In preferences page switch to “Event Reminder Email” to set “Subject and Body” information of reminder E-mail.

[$…$] in subject and content is a specific parameter and will be replaced with actual content while the E-mail is being sent. Parameters are described below:

Parameter	Description
EVENT_START_DATE	Agendum start date
EVENT_TITLE	Agendum title
PORTAL_URL	Portal host address
PORTLET_NAME	“Agendum”
TO_NAME	“Recipient name”
SYSTEM_MESSAGE	“This is the mail delivery system do not respond directly to”

3.1.2.2 Assignments Email

In preferences page switch to “Assignments email” to set “Subject and content” information of assignment notification E-mail.



Definition of Terms

[$EVENT_STATUS$]	Event Status
[$STATUS$]	Advertise Status
[$EVENT_SUBJECT$]	Title
[$SUBJECT$]	Title [Content]
[TO_NAME]	Receiver
[$HELLO$]	Hello
[$MAIL_CONTENT$]	This message sent by the Portal System,do you take notice of the status of the following
[$EVENT_HANDLE$]	Assign User
[$HANDLE_PEOPLE$]	Assign User [Content]
[$EVENT_DATE$]	Assign Date
[$DATE$]	Assign Date [Content]
[$EVENT_DESCRIPTION$]	event description
[$DESCRIPTION$]	event description [Content]
[$ASSIGN_EXPLAIN$]	Assign Explain
[$EXPLAIN$]	Assign Explain [Content]
[$RETURN_PEOPLE$]	Return User
[$RETURNPEOPLE$]	Return User [Content]
[$RETURN_DATE$]	Return Date
[$RETURNDATE$]	Return Date [Content]
[$SYSTEM_MESSAGE$]	This is the mail delivery system do not respond directly to

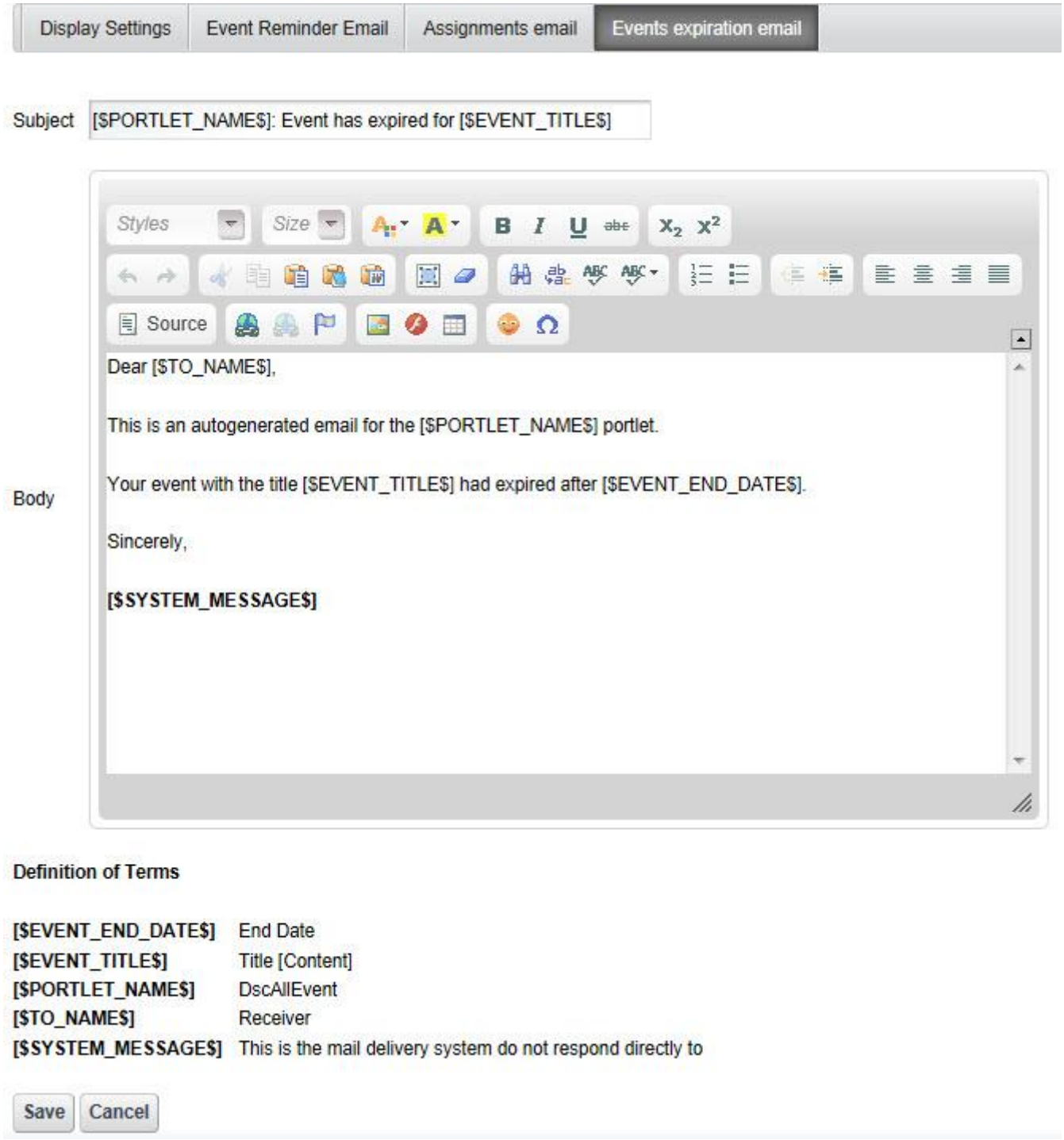
Save Cancel

[$…$] in subject and content is a specific parameter and will be replaced with actual content while the E-mail is being sent. Parameters are described below:

Parameter	Description
EVENT_STATUS	“Event Status”
STATUS	Agendum status
EVENT_SUBJECT	“Title”
SUBJECT	Agendum title
TO_NAME	“Recipient name”
HELLO	“Hello”
MAIL_CONTENT	“This message sent by the Portal System,do you take notice of the status of the following”
EVENT_HANDLE	“Assign User”
HANDLE_PEOPLE	Assign User [Content]
EVENT_DATE	“Assign Date”
DATE	Assign Date [Content]
EVENT_DESCRIPTION	“event description”
DESCRIPTION	event description [Content]
ASSIGN_EXPLAIN	“Assign Explain”
EXPLAIN	Assign Explain [Content]
RETURN_PEOPLE	“Return User”
RETURNPEOPLE	Return User [Content]
RETURN_DATE	“Return Date”
RETURNDATE	Return Date [Content]
SYSTEM_MESSAGE	“This is the mail delivery system do not respond directly to”

3.1.2.3 Events Expiration Email

In preferences page switch to “Events expiration email” to set “Subject and Body” information of expiration notification E-mail.



Tips [$…$] in subject and content is a specific parameter and will be replaced with actual content while the E-mail is being sent. Parameters are described below:

Parameter	Description
EVENT_END_DATE	End date

EVENT_TITLE	Event title
PORTLET_NAME	“Event”
TO_NAME	“Receiver”
SYSTEM_MESSAGE	“This is the mail delivery system do not respond directly to”

3.1.3 Portlet Permission Setting

Click “Setting” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

Data entity	Agendum Portlet
Permitted to	Preferences, Add to Page, View, Permissions, Configuration

3.2 Message Center

It enables message transmission among users. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.2.1 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Message Center Portlet
Permitted to	Do not apploy datamask, Add to Page, View, Permissions, Configuration

3.3 My Menu

It enables the user to create and manage common menus. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.3.1 Portlet Permission Setting

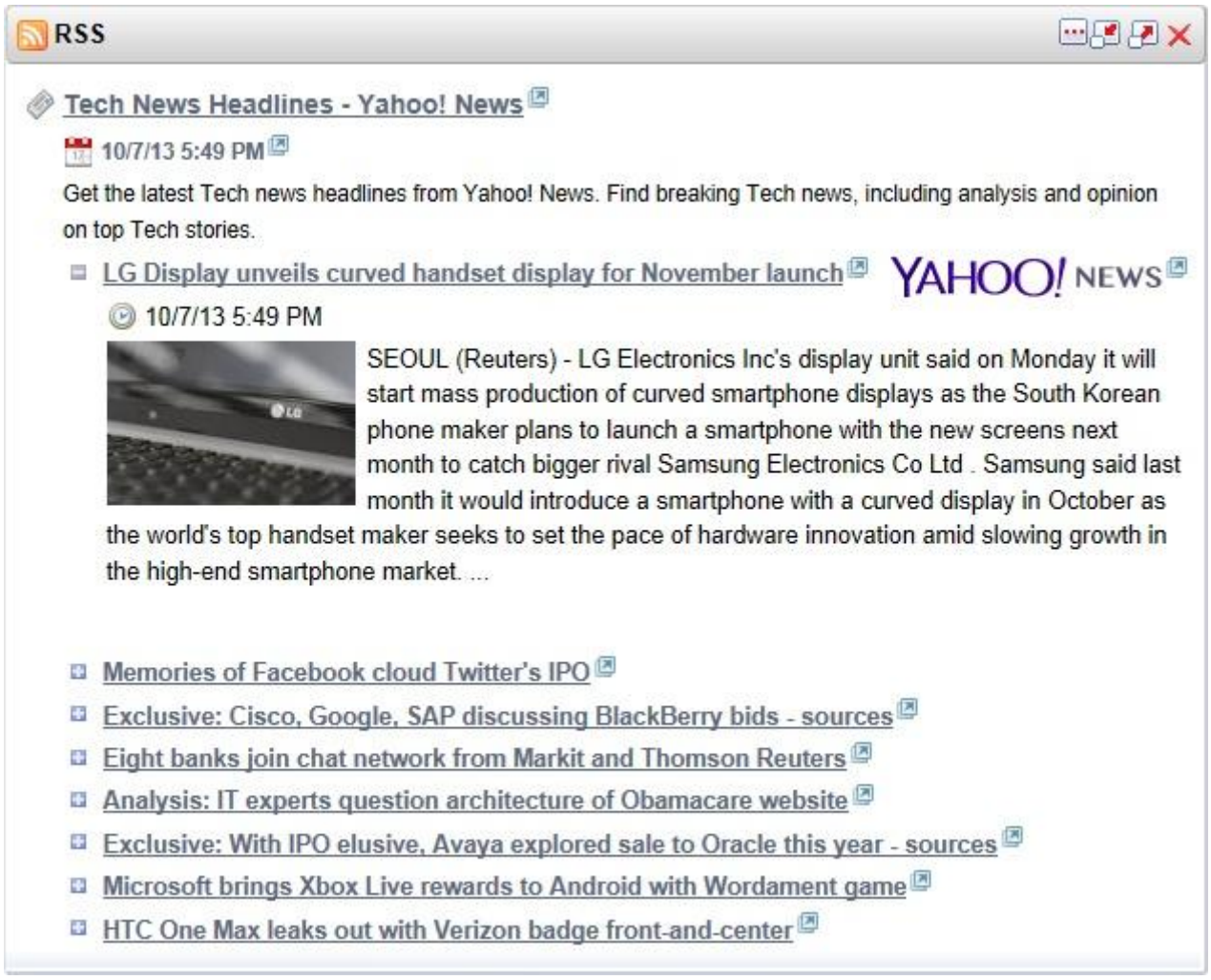
Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	My Menu Portlet
Permitted to	Add to Page, View, Permissions, Configuration

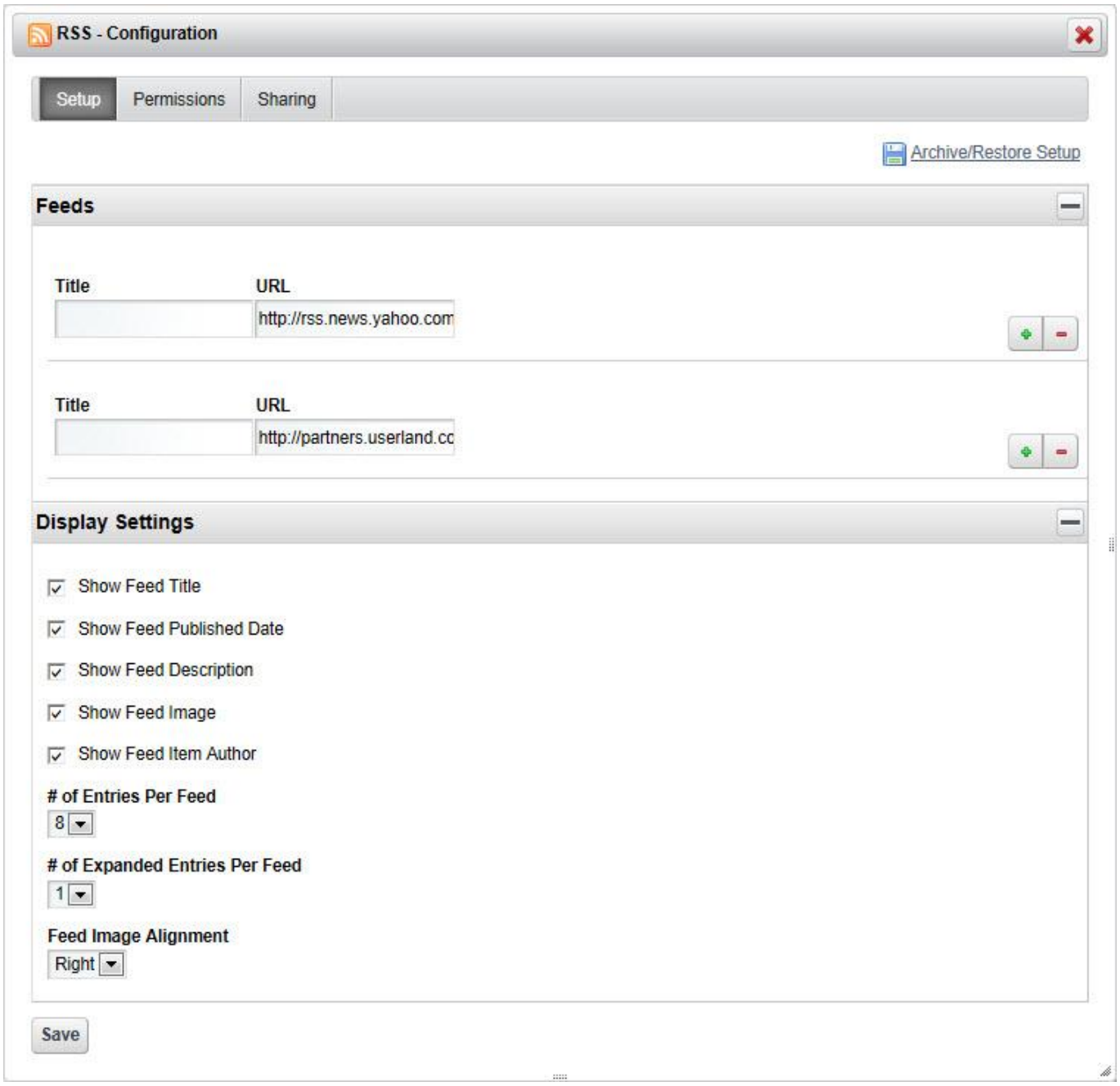
3.4 RSS

It enables the user to subscribe to RSS channel and get the latest information anytime.


RSS
Tech News Headlines - Yahoo! News
10/7/13 5:49 PM
Get the latest Tech news headlines from Yahoo! News. Find breaking Tech news, including analysis and opinion on top Tech stories.
LG Display unveils curved handset display for November launch
YAHOO! NEWS
10/7/13 5:49 PM
SEOUL (Reuters) - LG Electronics Inc's display unit said on Monday it will start mass production of curved smartphone displays as the South Korean phone maker plans to launch a smartphone with the new screens next month to catch bigger rival Samsung Electronics Co Ltd . Samsung said last month it would introduce a smartphone with a curved display in October as the world's top handset maker seeks to set the pace of hardware innovation amid slowing growth in the high-end smartphone market. ...
Memories of Facebook cloud Twitter's IPO
Exclusive: Cisco, Google, SAP discussing BlackBerry bids - sources
Eight banks join chat network from Markit and Thomson Reuters
Analysis: IT experts question architecture of Obamacare website
Exclusive: With IPO elusive, Avaya explored sale to Oracle this year - sources
Microsoft brings Xbox Live rewards to Android with Wordament game
HTC One Max leaks out with Verizon badge front-and-center

3.4.1 RSS Channel Setting

Click “Configuration” in RSS toolbar to access the RSS channel setting page.



3.4.1.1 Add RSS Channel

After accessing the RSS channel setting page, click to add an entry by entering related data and clicking “Save”.

- Title: User-defined RSS channel title
- URL: Enter the URL of RSS channel

3.4.1.2 Remove RSS Channel

After accessing the RSS channel setting page, click for data to be removed and click “Save”.

3.4.1.3 RSS display setting

After accessing the RSS channel setting page, adjust display setting and click “Save”.

- Show Feed Title: Check it to display the title of message source
- Show Feed Published Date: Check it to display the publication date of message source
- Show Feed Description: Check it to display the description of message source
- Show Feed Image: Check it to display the picture of message source
- Show Feed Item Author: Check it to display the author of message source
- # of Entries Per Feed: Set the message source count of each post (1~9)
- # of Expanded Entries Per Feed: Set the count of posts displayed by source (0~9)
- Feed Image Alignment: Set the alignment method of pictures of message source (left/right)

3.4.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	RSS Portlet
Permitted to	Add to Page, View, Permissions, Configuration

3.5 Calendar

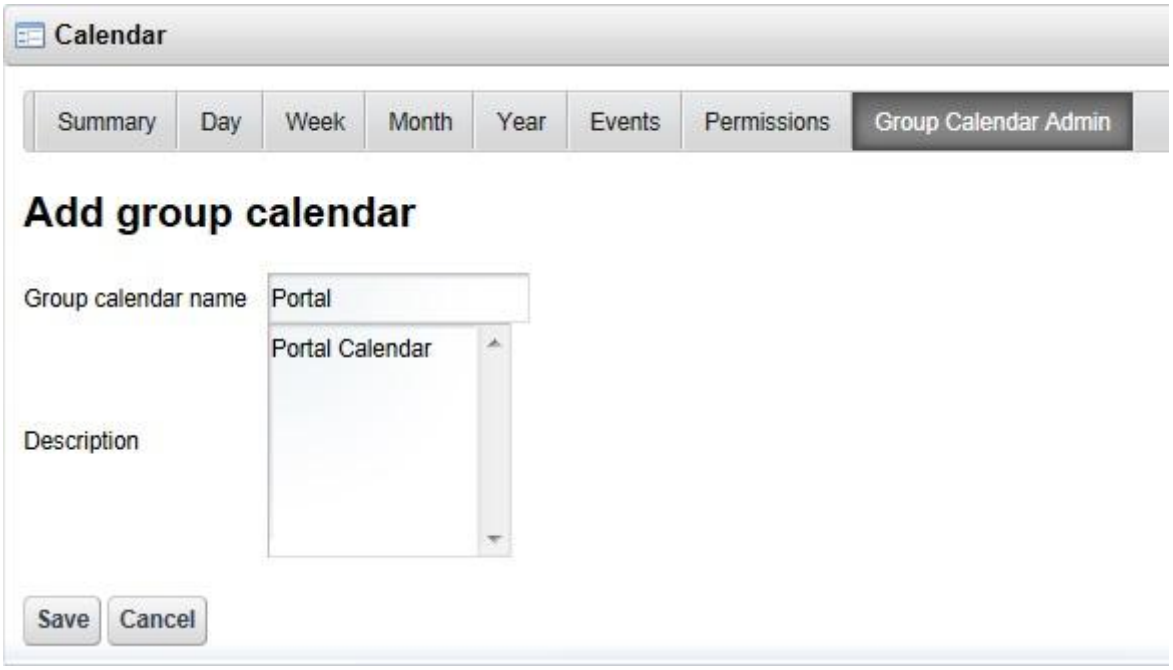
This feature enables the user to manage his/her calendar and to view the calendar by day, week, month and year. By creating calendar events, the user may send e-mail notification and include such events in the to-do list so that he/she can improve task management efficiency. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.5.1 Group Calendar

This feature enables the user to set a group calendar and create calendar events for all members of the group to view. The user may designate group members separately or use the created “Organization” members.

3.5.1.1 Add Group Calendar

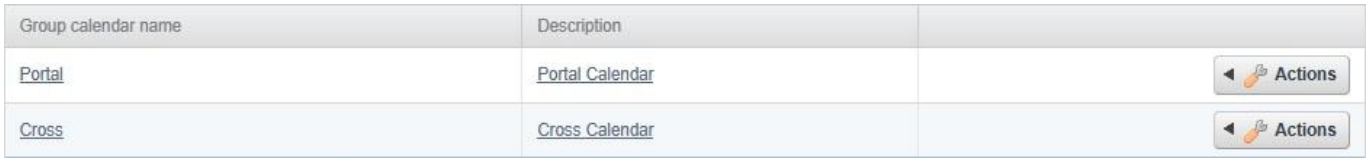
Select the “Group Calendar Admin” tab and then click “Add” to activate the add group calendar page. After entering related data, click “Save” to finish the addition.



- Group calendar name: Enter the name of the group calendar.
- Description: Enter details of the group calendar.

3.5.1.2 Control Group Calendar

Click “Actions” that follows the data entry of “Group calendar” to control the group calendar.



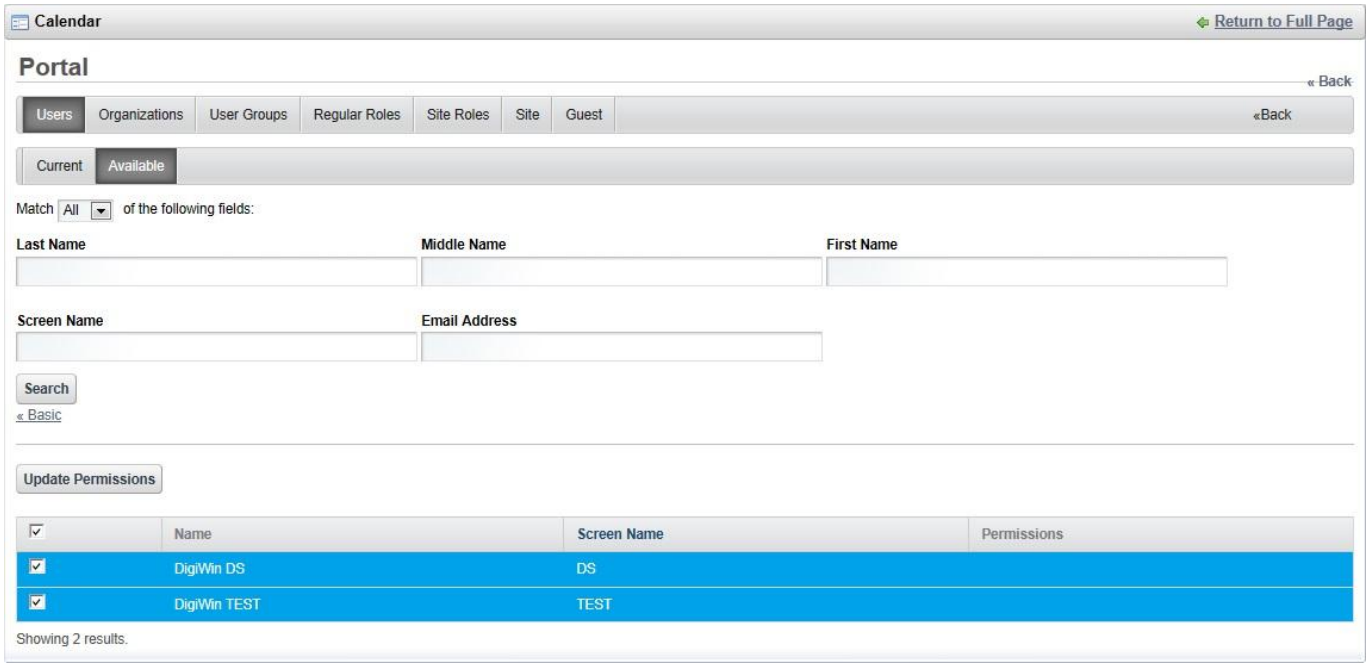
- Edit: Click “Actions” on the right of the data entry and then select “Edit” to access the “Edit” page. For data editing method, please refer to “Add group calendar”
- Delete: Click “Actions” on the right of the data entry and then select “Delete” to delete the group calendar
- Permissions: Click “Actions” on the right of the data entry and then select “Permissions” to access the group calendar’s user permission setting page. For setting method, please refer to the section of “Set sharing object”

Permission setting:

Data entity	Group calendar
Permitted to	Add event, browse, permission

3.5.1.3 Set Group Sharing Object

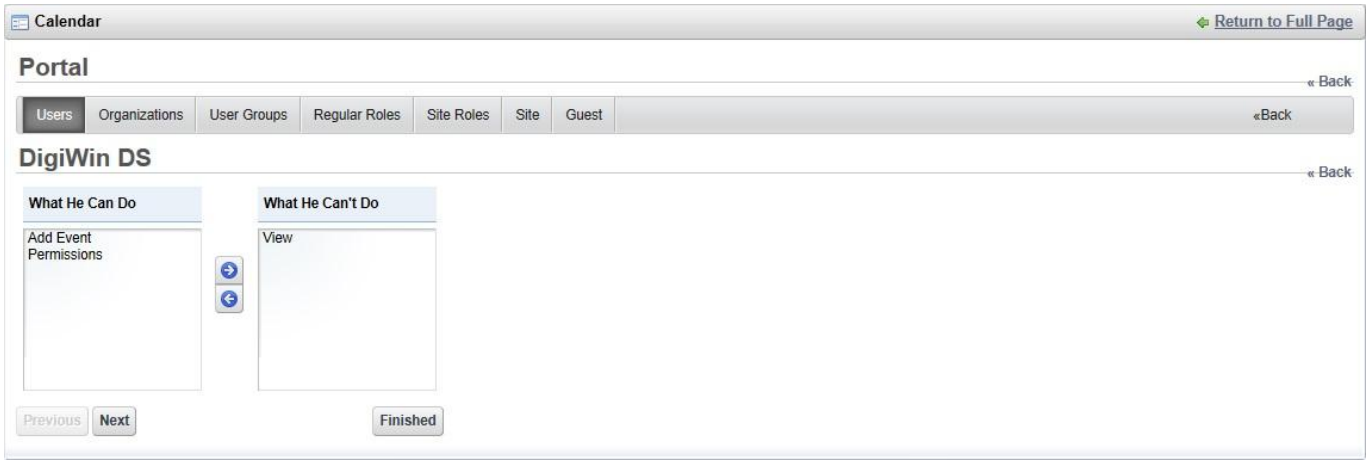
On the “Group calendar” list, click “Actions” on the right and then select “Permissions” to access the setting page of calendar sharing permission.



- To switch to a particular group level (e.g. “Users” group level), switch to the “Available” tab, check

the desired sharing objects and click “Update Permissions”.

- Access the permission setting page and click or to add the permission to the “What He Can Do” on the left. After completing the setting, click “Next” to continue permission setting of the next sharing object. After completing the setting of all objects, click “Finish”.
  There are two kinds of permission available:
  - View: Allow sharing objects to view the events of the group calendar
  - Add Event: Allow sharing objects to create calendar events for the group
  - Permissions: Allow sharing objects to set permission for the group calendar

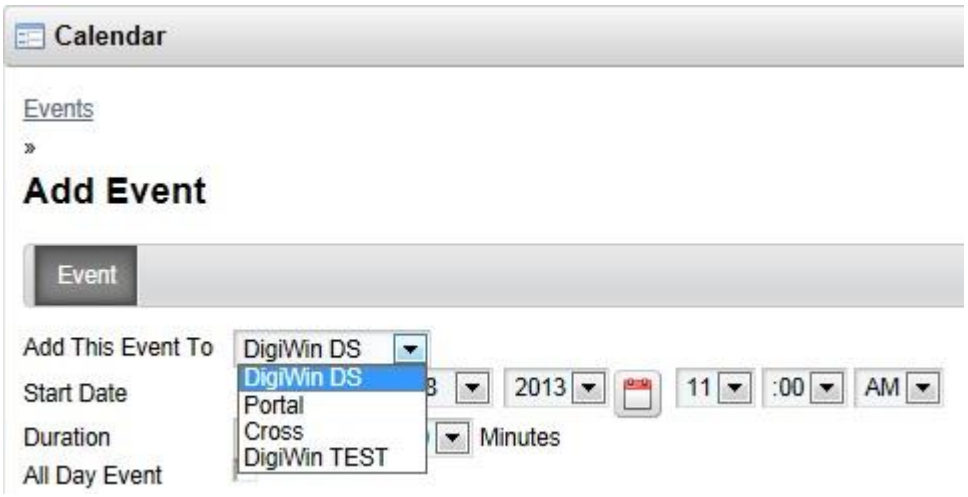


3.5.1.4 View Group Calendar

After completion of sharing setting (with the permission to “View”), the name of the group calendar will appear on the view list of the designated sharing object. Check the name of the group calendar to view calendar events of the group.

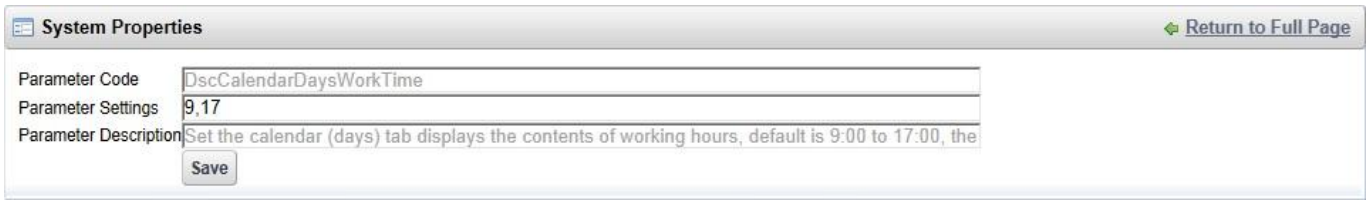
3.5.1.5 Add Group Calendar Event

After completion of sharing setting (with the permission to “Add Event”), the name of the group calendar will appear on the view list of the designated sharing object. Select the name of the group calendar to add a calendar event to the group



3.5.2 Set Work Time of the Calendar

In the "Daily calendar" view mode, the system shows work time in white area and non-work time in gray area.



By default, the calendar's work time is 9~17 o'clock. If necessary, make adjustment using the following steps:

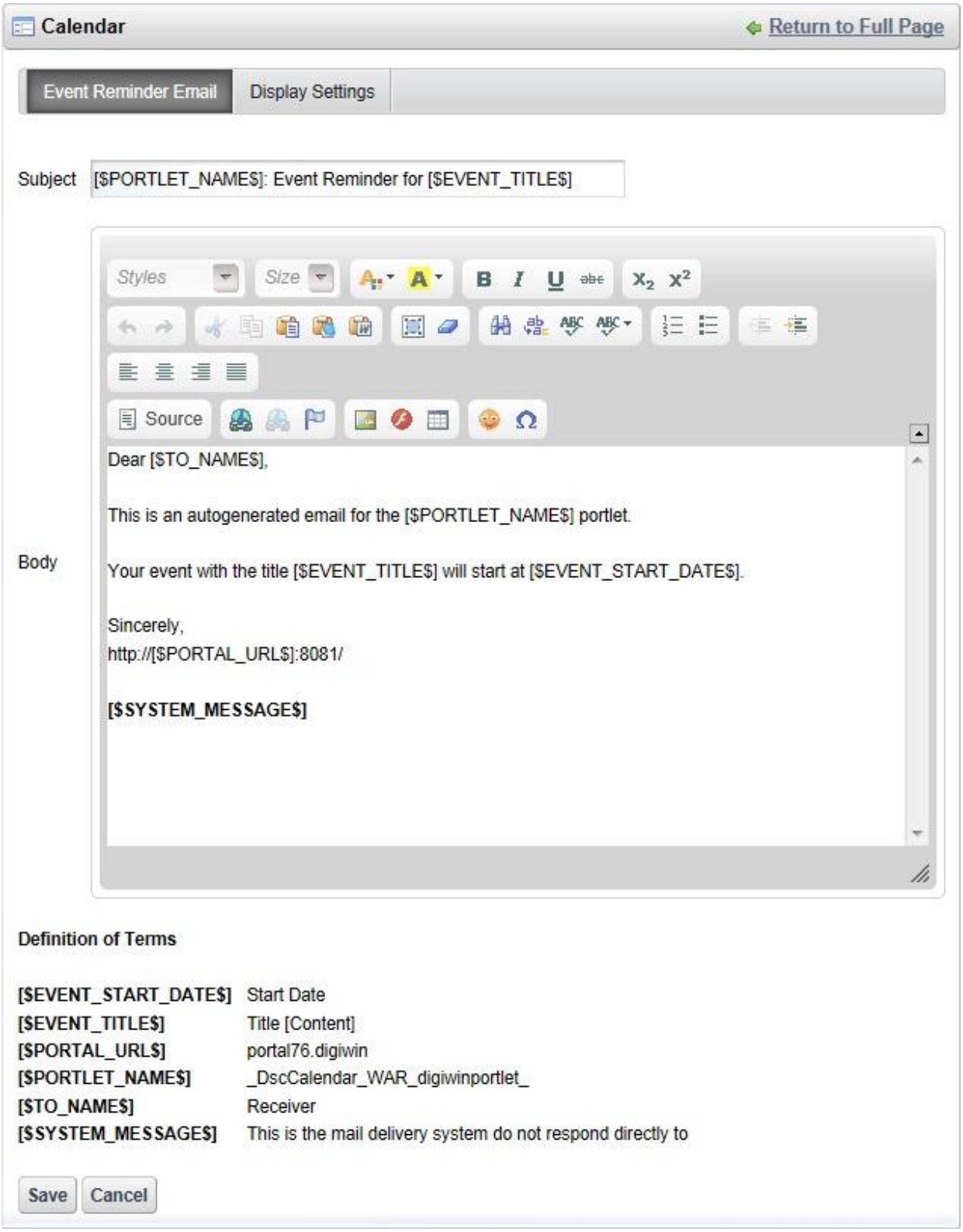
- In "System Properties" edit the parameter "DscCalendarDaysWorkTime"
- In "Parameter Settings" enter work time (enter two integral numbers in the order of start time and end time of working period in 24-hour clock format)
- After setting, click "Save"

3.5.3 E-mail Notification Format Setting

Click "Preferences" in the toolbar of calendar to access the calendar's preferences page. After finishing related settings, click "Save".

3.5.3.1 Event Reminder Email

On the preferences setting page switch to “Event Reminder Email” tab to allow the user to set the “Subject and Body” information of the calendar reminder E-mail.



- Subject: Enter the subject of the calendar reminder E-mail
- Body: Enter the content of the calendar reminder E-mail

[$…$] in subject and content is a specific parameter and will be replaced with actual content while the E-mail is being sent. Parameters are described below:

Parameter	Description
EVENT_START_DATE	Start date of calendar event
EVENT_TITLE	Title of calendar event
PORTAL_URL	Portal host address
PORTLET_NAME	“Calendar”
TO_NAME	“Recipient name”
SYSTEM_MESSAGE	“This is the mail delivery system do not respond directly to”

3.5.4 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Calendar Portlet
Permitted to	Access in Control Panel, Add to Page, Configuration, View, Group calendar admin, Preferences, Permissions

3.6 Calendar Synchronization

This function enables the user to conduct two-way synchronization between Outlook calendar and Portal calendar. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.6.1 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Calendar synchronization Portlet
Permitted to	Add to Page, View, Permissions, Configuration

3.7 Event Trace

This function enables the user to track agendum list. For general information, please refer to “DigiWin Portal Operating Instructions”.

3.7.1 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Event Trace Portlet
Permitted to	Add to Page, View, Permissions, Configuration

4. Content Management

4.1 Documents and Media

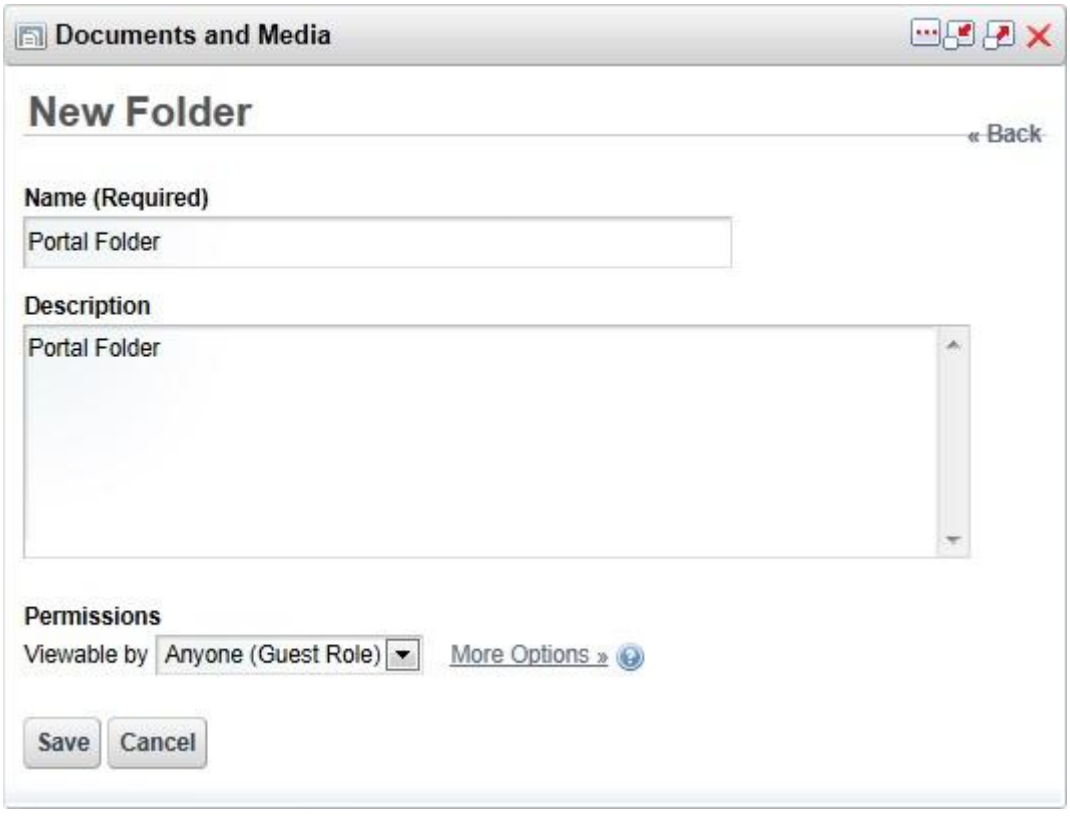
This feature provides the user with a space for file and picture sharing and classifies files or pictures and facilitates browsing and search through folder management.

4.1.1 Manage Folders and Documents

Documents and media Portlet displays the quantity of created folders and files, and facilitates file query and folder & document management.

4.1.1.1 Add Folder

Press the “Add” button and select “Folder” to open the add folder page. After entering related data, click “Save”.



- Name: Enter the name of the folder
- Description: Enter the description of the folder
- Permissions: Decides who has the permission to view the folder. Click “More Options” to make further permission setting of Guest and Site Member.

4.1.1.2 Add Subfolder

After accessing a folder, press “Add” button and select “Subfolder” to add a subfolder to its lower level. For data entering, refer to the previous section.

4.1.1.3 Control Folder

Press “▼” that follows the data entry of “Folder” to control folders.

- Edit: Click “▼” on the right of the data entry and then select “Edit” to access the Edit page.
- Move: Click “▼” on the right of the data entry and then select “Move”. Click “Select” or “Remove” to set the upper-level folder
- Permission: Click “▼” on the right of the data entry and then select “Permissions” to access the folder’s user permission setting page

  Permission setting:

Data entity	File folder
Permitted to	Delete, Add Subfolder, Add Shortcut, Add Document, Access, Update, Permissions, View

- Copy Permissions To…: Press “▼” on the right of the data entry and then select “Copy Permission To…” to copy the folder’s permission to other folders. Please refer to the section “Copy folder permission”
- Delete: Press “▼” on the right of the data entry and then select “Delete” to delete the folder
- Add Subfolder: Press “▼” on the right of the data entry and then select “Add subfolder” to access the add folder page.
- Access from Desktop: Press “▼” on the right of the data entry and then select “Access from Desktop”. A window will pop up and displays the folder’s WebDAV URL link

4.1.1.4 Copy Folder Permission

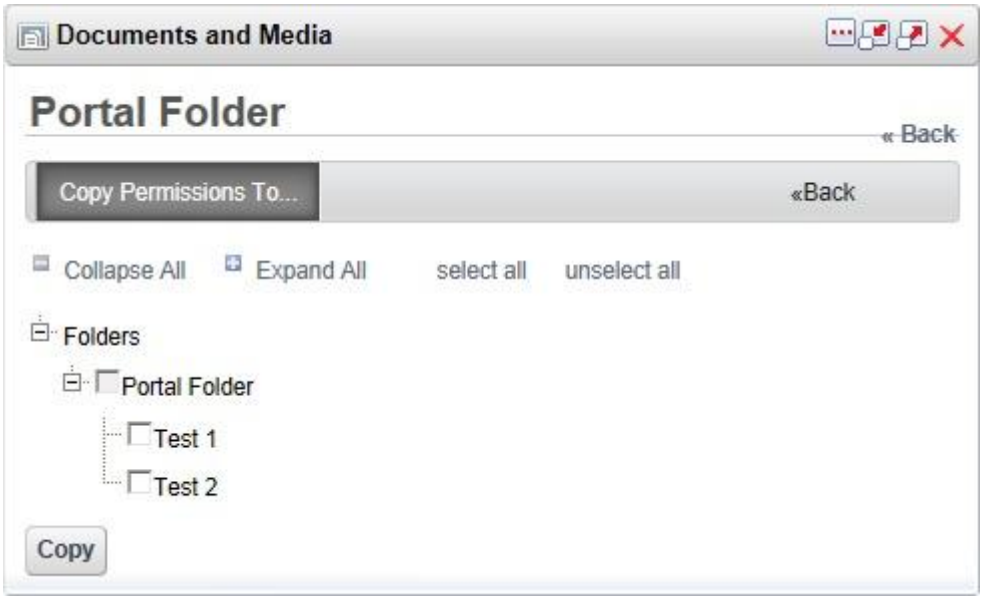
Tips This function applies to system administrator only.

This features enables the user to copy the permission data of a folder (hereinafter referred to as “Source folder”) to the designated folder (hereinafter referred to as “Target folder”).

Setting method: After accessing the “Folder” list, press “▼” on the right of the source folder and then select “Copy Permissions To…” to access the permission copying page. Check target folder(s) (more than one folders may be selected at a time) and click “Copy”.

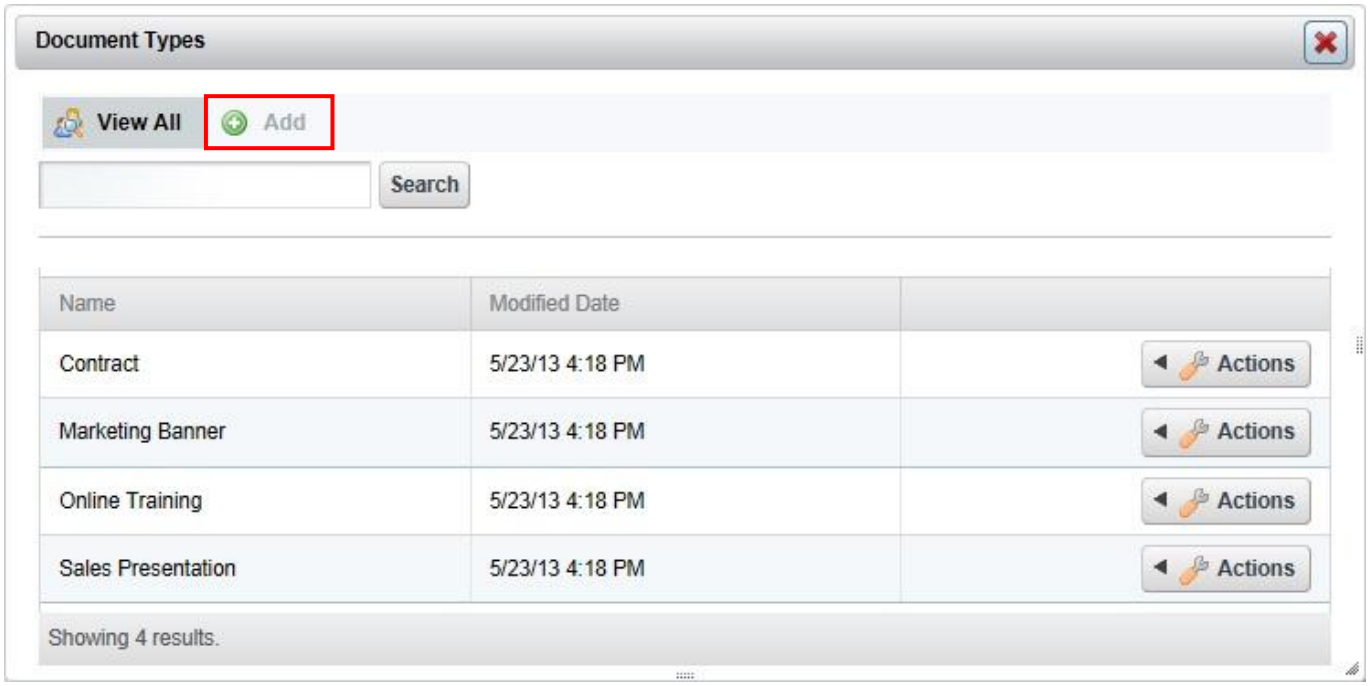
Tips While the permission is being copied, the original permission data of the target folder will be overwritten.

The permission of “Folder” and “Documents” is separately set, so the permission will be copied onto “Target folder” only and will not be copied onto “Files in target folder”.
To copy file permission, please refer to the section “Copy Document Permission”.

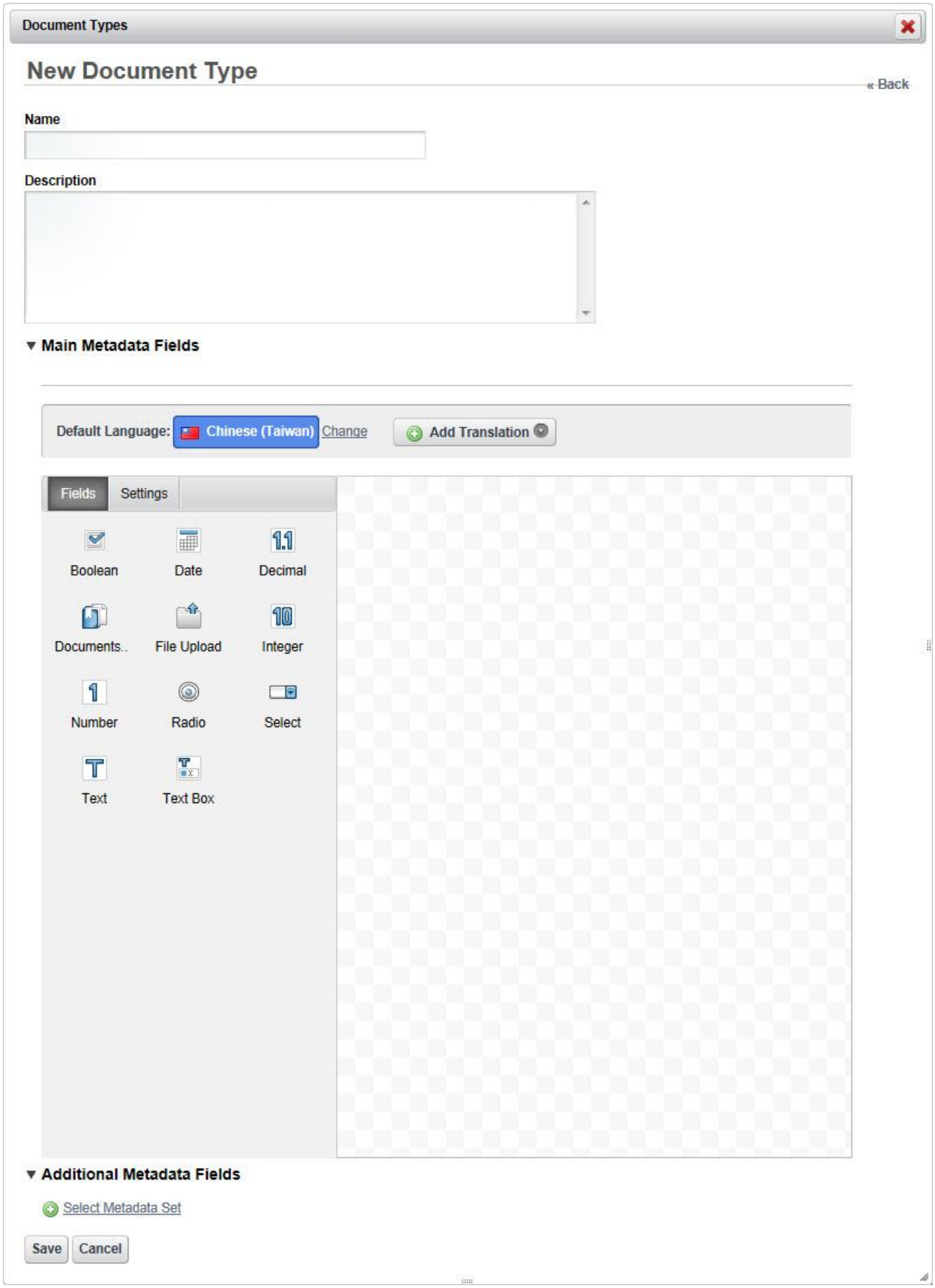


4.1.1.5 User-defined Document Type

Press the “Manage” button and select “Document Types”. A window will pop up and displays all file types. Press the “Add” button to access the page of add file type.

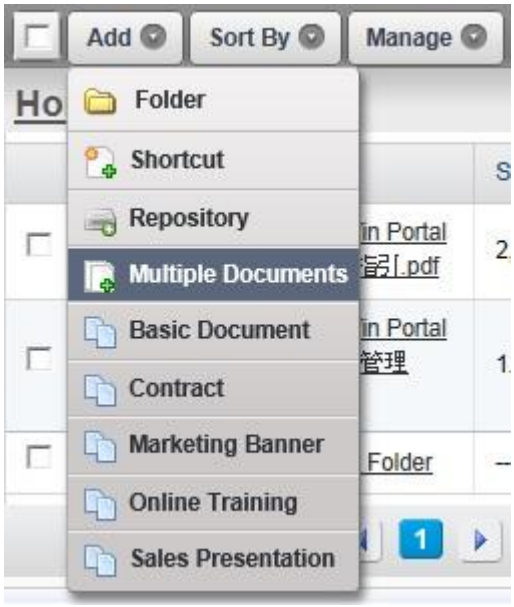


Enter the name and description and set Metadata field. Click “Save” to finish the addition.



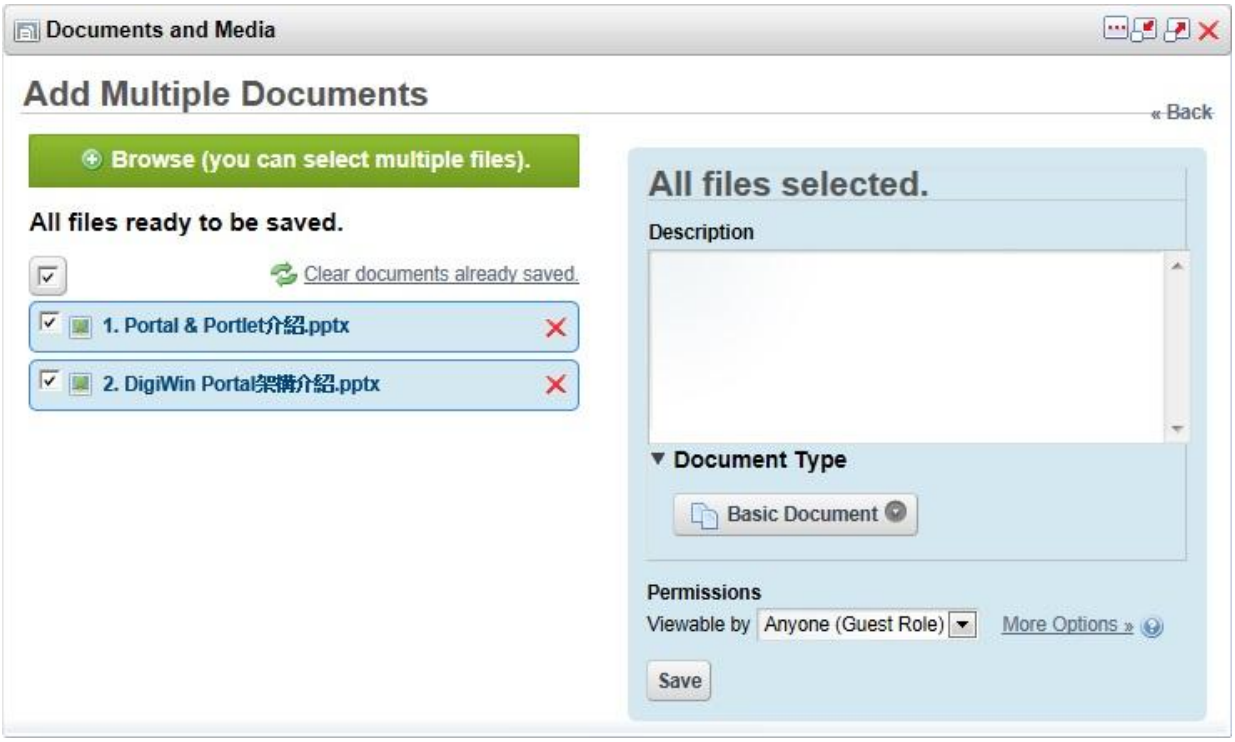
4.1.1.6 Add Document

First access the folder where the file will be stored. Press “Add” button and select the type of file to be added or method of addition to access the add file page.

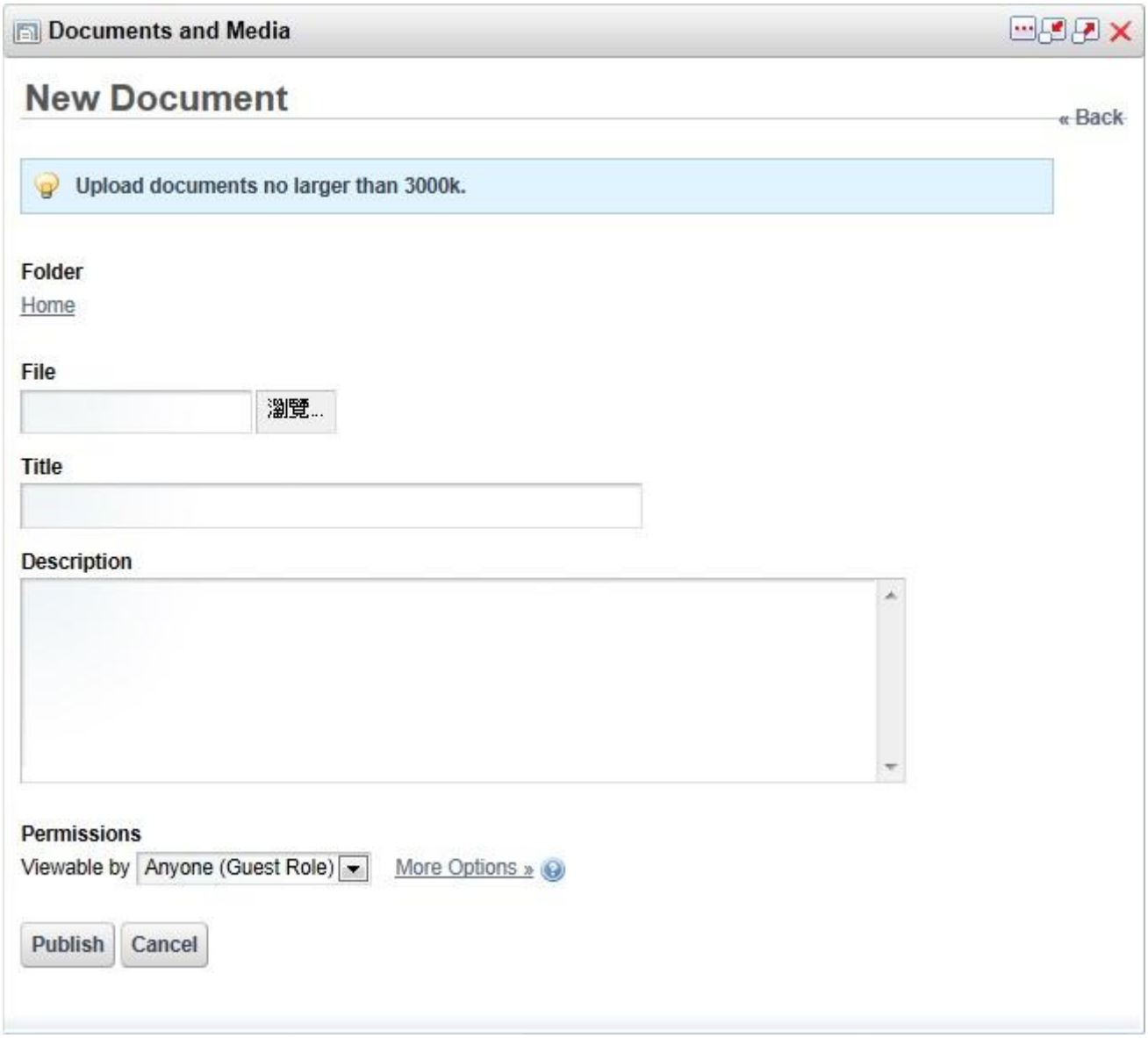


The following two upload methods are available:

(1) Click “Add multiple files” to upload several files at a time



(2) Select user-defined file type or default type to access the upload page and upload only one file at a time

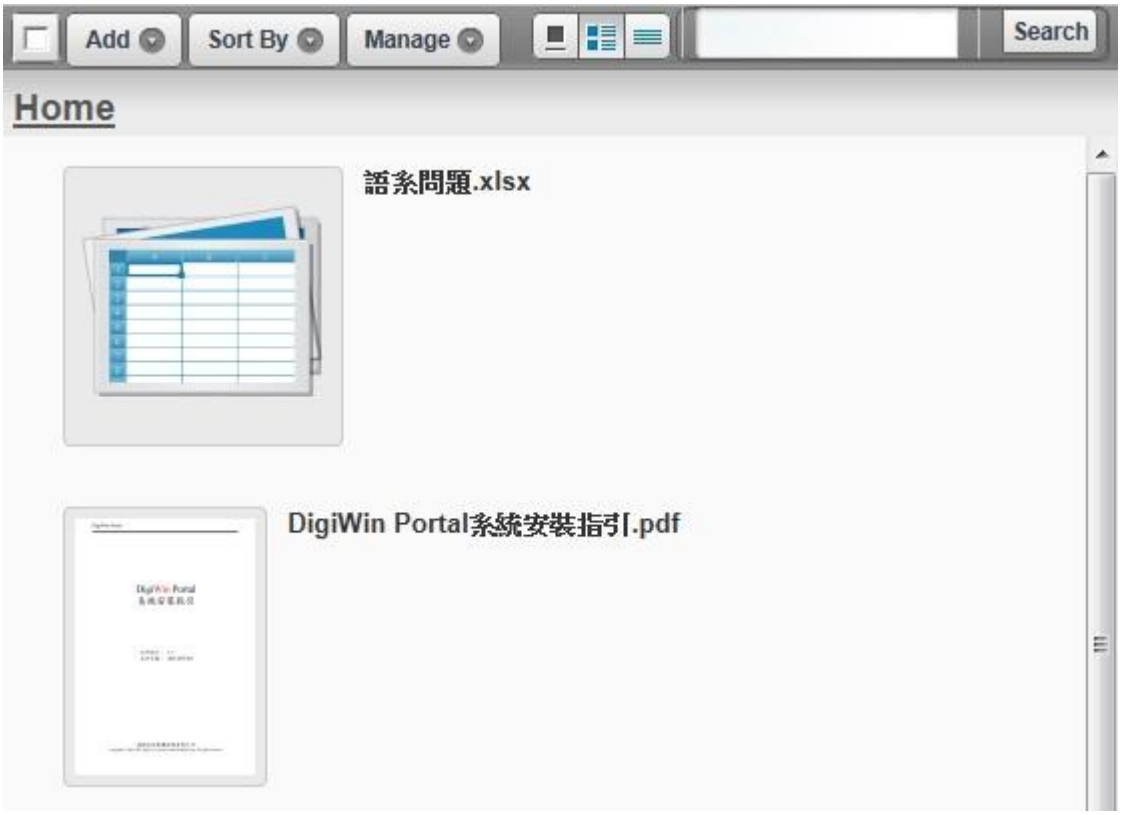


4.1.1.7 View Document

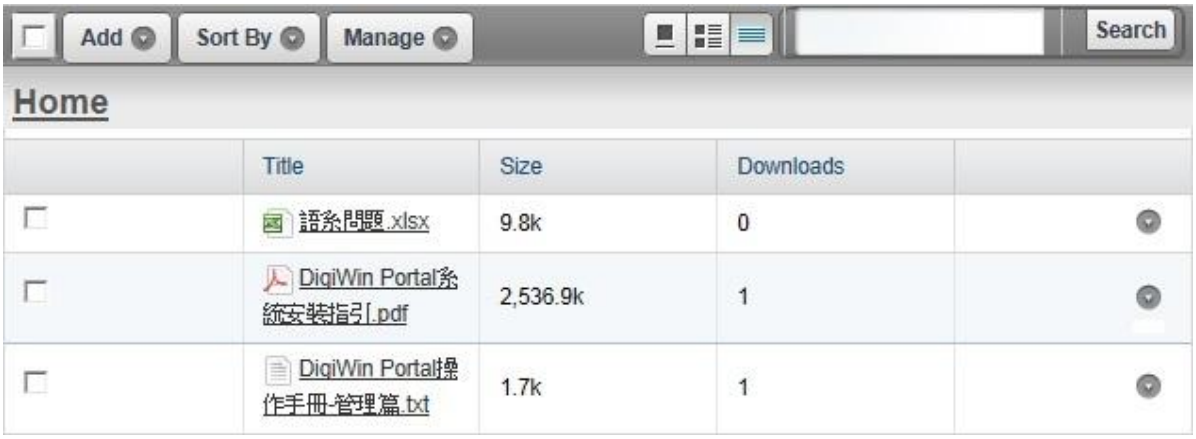
Press the icons at the top right corner of Portlet to change among different methods to view files. The 3 methods to view files are shown below.

(1) Icon View

(2) Descriptive View



(3) List View

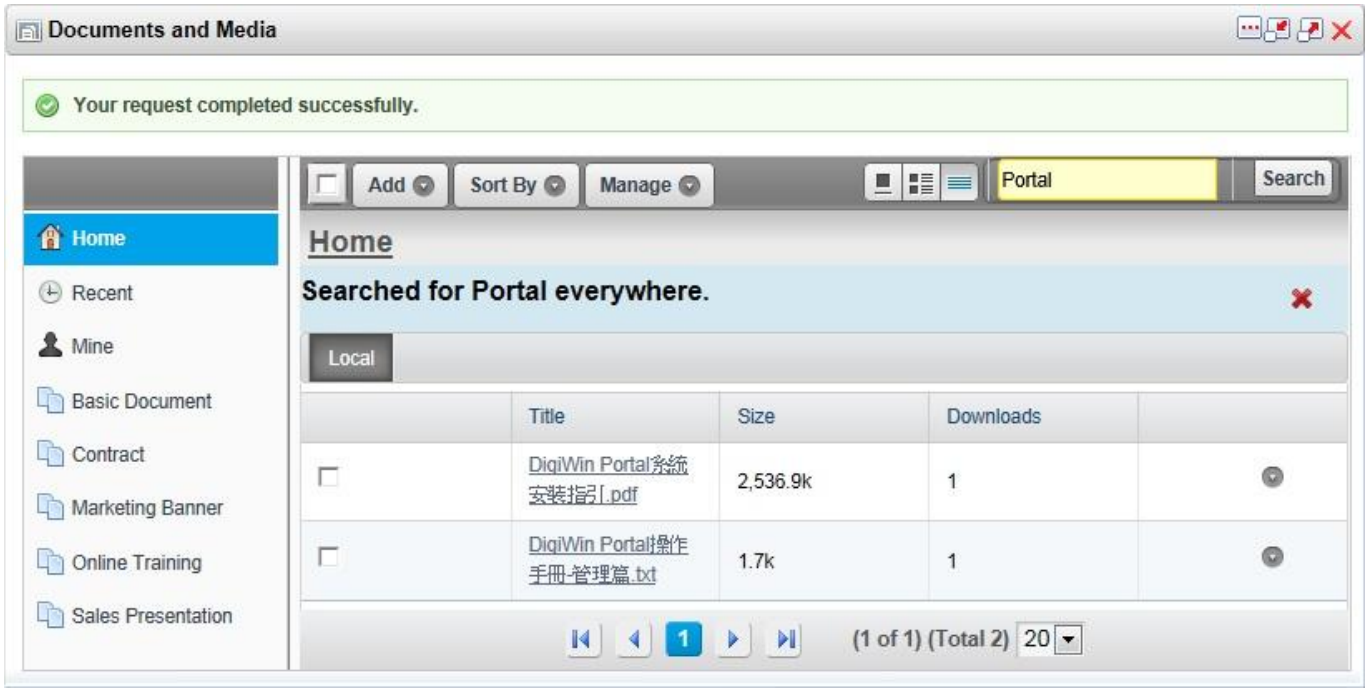


4.1.1.8 Search Document

After entering the keyword of file title or file description, click “Search”. Search results will display the files that meet the conditions and show the relevance of search results.

Tips Search scope covers all files in the folder and its subfolders.

Tips If the date range is set by default (please refer to the following section “Set default date range”), the system will provide the date range conditions and only files whose date falls within that range will be searched out.



4.1.1.9 Description of Search Condition Setting

- **Introduction of "Token":**

Because "Token" is used as the minimum unit for comparison during search, the entered keyword needs to match a complete Token and incomplete character entered is not acceptable. For example, the "DigiWin Portal" data will be searched out if "DigiWin" or "Portal" is entered, but not if "Digi" is entered.

※The data to be searched is parsed into one or more Tokens before comparison.

Token parsing principles are as follows:

- Continuous English figures (including "-" hyphen, "_" underline character as a link) are deemed one Token
- Those separated by non-English-figure symbol (excluding "-" hyphen, "_" underline character), whitespace, or Chinese character are deemed an independent Token
- Each Chinese character is deemed an independent Token

※Examples of Token parsing:

Data to be searched	Term as parsing result	Description
2010Finance 報表 or 2010-Finance 報表	2010Finance、報、表	➢ "2010Finance" or "2010-Finance" is a continuous English figure and is deemed one Token ➢ Each Chinese character is a Token
(2010)Finance 報表	2010、Finance、報、表	➢ "(2010) Finance" is separated by parenthesis and is deemed two Tokens

- **Enter search string:**

(1) Wildcards:

"Wildcards" may be added to search string to increase the flexibility of search conditions. Wildcards fall into the following 2 types:

- "?" (question mark) represents any single character
- "*" (asterisk) represents nil, one or more characters

※Note: Wildcards cannot head any query string

※Examples of Wildcards:

Data to be searched include AA, AB, ABC, ACB, ADB, ABCD, ACBD

Query string	Description of query conditions	Search results
AB*	The data start with AB, followed by nil, one or more characters	AB、ABC、ABCD
A?	The first character is A and the second character is any character	AA、AB

A*B	The data start with A and end with B, and has nil, one or more characters between A and B	AB、ACB、ADB
A?B	The first character is A, the second character may be any character, and the third character is B	ACB、ADB
A?C*	The first character is A, the second character may be any character, and the third character is C, which is followed by nil, one or more characters	ABC、ABCD
A*B?	The data start with A, which must be followed by nil, one or more characters and then by B, and end with any character	ABC、ACBD
*B	Syntax error! Wildcards cannot head any query string	Data that meet search conditions are not found
?B	Syntax error! Wildcards cannot head any query string	Data that meet search conditions are not found

(2) Logic condition search:

Use “Logic operation” between several keywords to form more advanced query conditions.

- OR (或): It is acceptable to meet one or more of all keywords, and simplified symbol “||” may be used instead. OR is a default logic condition and can be omitted. If several keywords are separated by whitespaces, OR operation may apply
- AND (且): All keywords have to be met and simplified symbol “&&” may be used instead
- NOT (非): The designated keyword is excluded and simplified symbol “!” may be used instead. NOT cannot be used where there is only one keyword. For example, NOT “Integration Solution” is unacceptable
- “+” (plus sign, designated inclusion): The designated keyword must be included
- “-” (minus sign, designated exclusion): The designated keyword must be excluded

※Note: All English letters in logic conditions must be capitalized

※Examples of logic condition search:

Query string	Description of query conditions
DigiWin **OR** Portal or DigiWin || Portal or DigiWin Portal	Search any data that contain “DigiWin” or “Portal”
“DigiWin Portal” **AND** “Integration Solution” or “DigiWin Portal” **&&** “Integration Solution”	Search any data that contain both “DigiWin Portal” and “Integration Solution”

“DigiWin Portal” **NOT** “Integration Solution” or “DigiWin Portal” **!**“Integration Solution”	Search any data that contain “DigiWin Portal” but do not contain “Integration Solution”
+Digiwin Portal	Search any data that contain “DigiWin” and possibly contain “Portal”
“DigiWin Portal” -“Integration Solution”	Search any data that contain “DigiWin Portal” but do not contain “Integration Solution”

(3) Group condition search:

Use parentheses to make logic conditions into group conditions to meet more complex search requirements.

For example, the following syntax will search any data that contain “DigiWin” or “Portal” and must contain “Integration”:

(DigiWin **OR** Portal)**AND** Integration

(4) Scope search:

Set the query scope for English letters and figures that are sequenced in order. There are two representation methods:

- Search result contains start value and end value. Represent it in brackets “[]”
- Search result does not contain start value and end value. Represent it in braces “{}”

※Start value and end value are separated by uppercase “TO”.

※Examples of scope search:

Data to be searched include 201007, 201008, 201009, 201010, AA, AB, ACB, AD, BC, DE

Query string	Description of query conditions	Search results
[201007 TO 201010]	From 201007 to 201010, including start value and end value	201007、201008、201009、201010
{201007 TO 201010}	From 201007 to 201010, excluding start value and end value	201008、201009
[AA TO AD]	From AA to AD, including start value and end value	AA、AB、ACB、AD
{AA TO C}	From AA to C, including start value and end value	AB、ACB、AD、BC

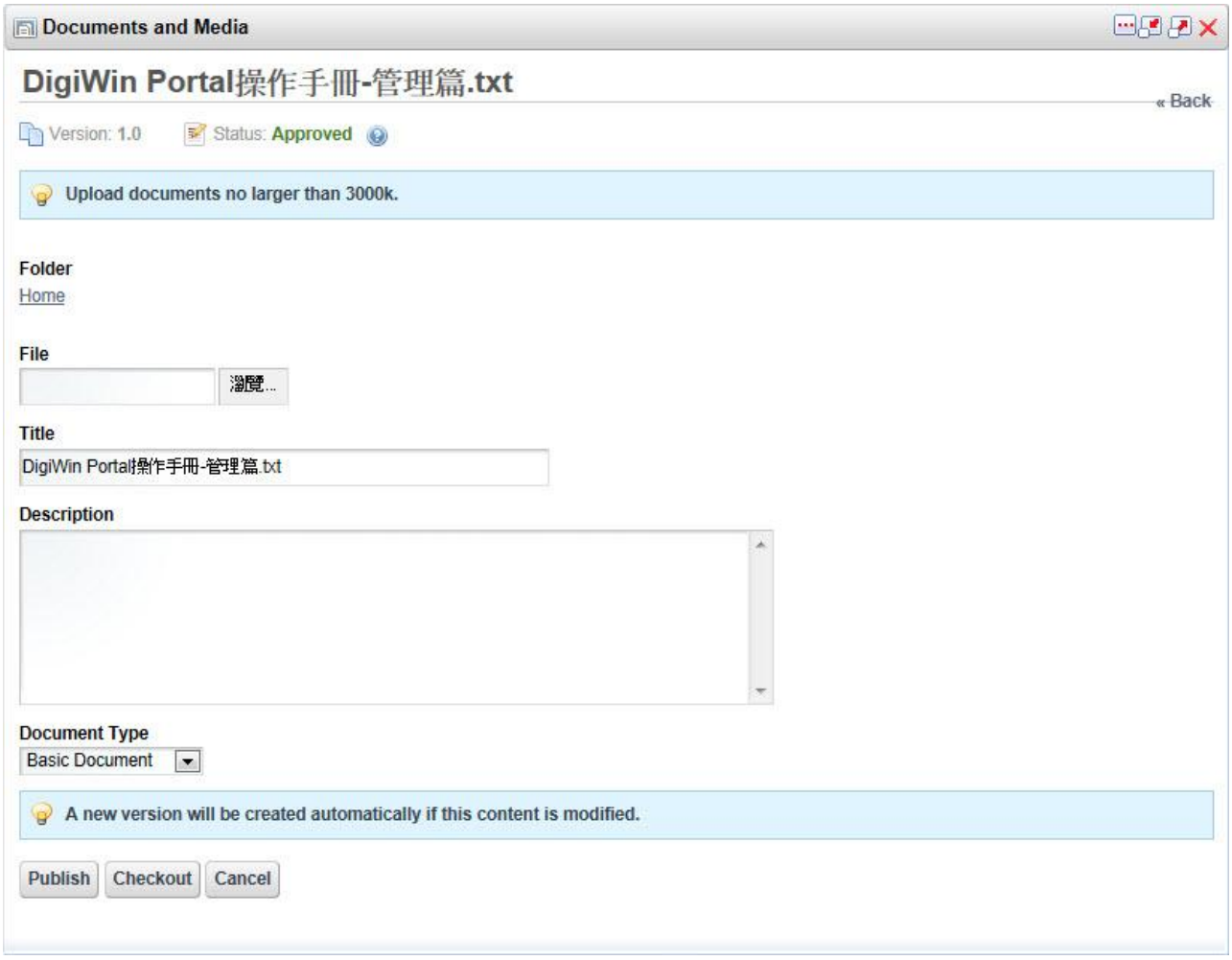
(5) Uppercase and lowercase letters are not differentiated in query string. For example, “Portal” can be searched when “PORTAL” or “Portal” is entered

4.1.1.10 Control Document

Press "▼" that follows the data entry of "Document" to control a file.

	Title	Size	Downloads	
☐	DigiWin Portal操作手冊-管理篇.txt	1.7k	1	▼
☐	DigiWin Portal系統安裝指引.pdf	2,536.9k	1	▼
☐	語系問題.xlsx	9.8k	0	▼

- Download: Press "▼" on the right of data entry and then select "Download" to download the file
- Edit: Click "▼" on the right of the data entry and then select "Edit" to access the Edit page. Editable field:
  - Folder: Display the folder where the file belongs
  - File: To re-upload a file, please click "Browse" to select the file to be uploaded
  - Title: Allow the user to modify the title of the file
  - Description: Allow the user to modify details of the file
  - File type: Allow the user to change file type



- Move: Move: Click "▼" on the right of the data entry and then select "Move". Click "Select" or "Remove" to set the upper-level folder
- Checkout: Allow the user to lock a file, and the locked file cannot be editted. Press "Checkout" to lock a file. To unlock it, please press "Checkin"
- Permissions: Press "▼" on the right of data entry and then select "Permissions" to access the folder's user permission setting page

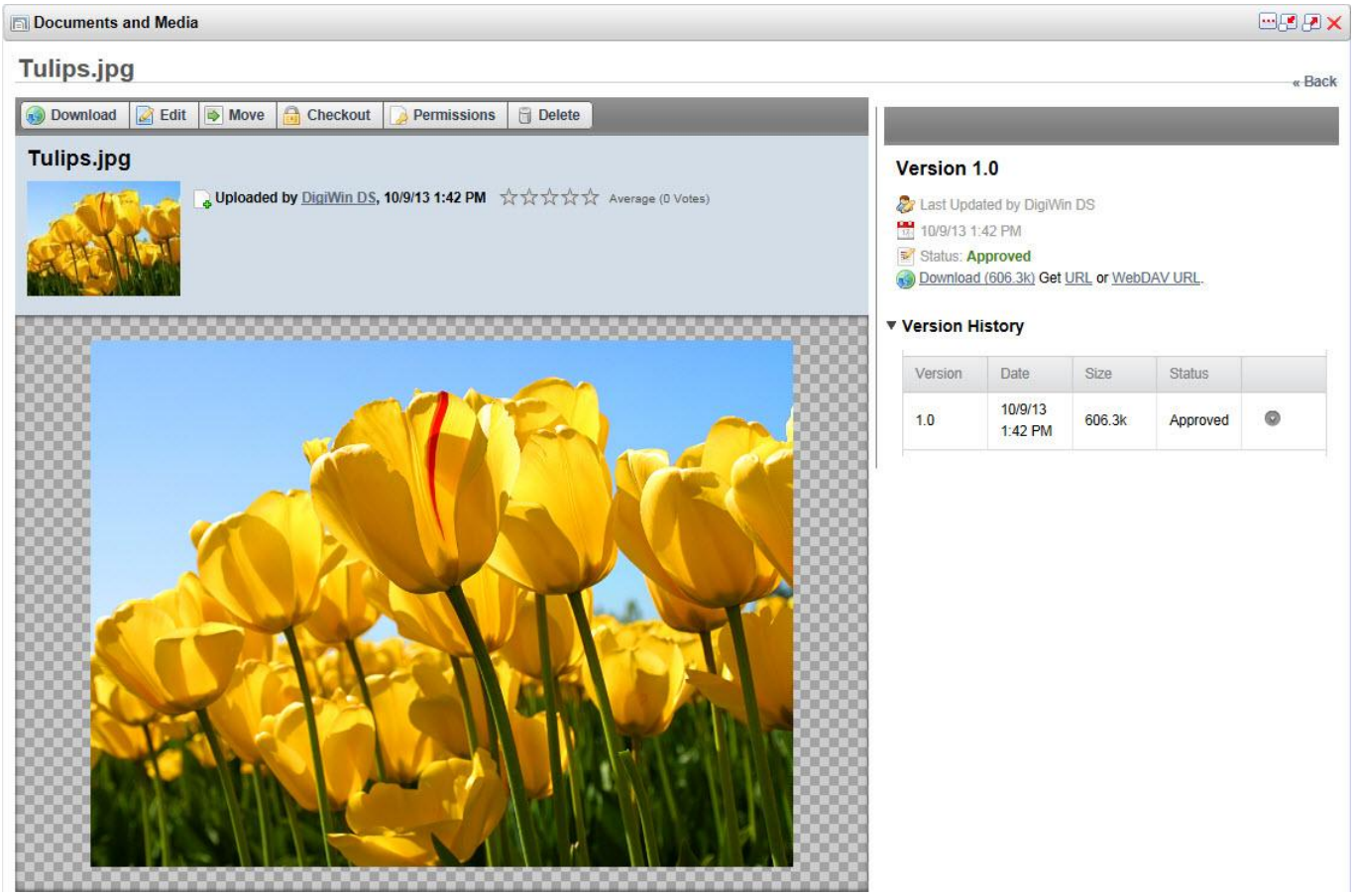
  Permission setting:

Data entity	File
Permitted to	Add Discussion, Delete, Delete Discussion, Permissions, Update, Update Discussion, View

- Copy Permissions To…: Press "▼" on the right of the data entry and then select "Copy Permissions To…" to copy the folder's permission to other folders.
- Delete: Click "▼" on the right of data entry and then select "Delete" to delete the file
- Open in MS Office (applicable to MS file only): Press "▼" on the right of data entry and then select "Open in MS Office" to open the file in MS Office

4.1.1.11 Preview Document

This feature enables the user to preview the content of PDF files and picture files.



4.1.1.12 Copy Document Permission

Tips This function applies to system administrator only.

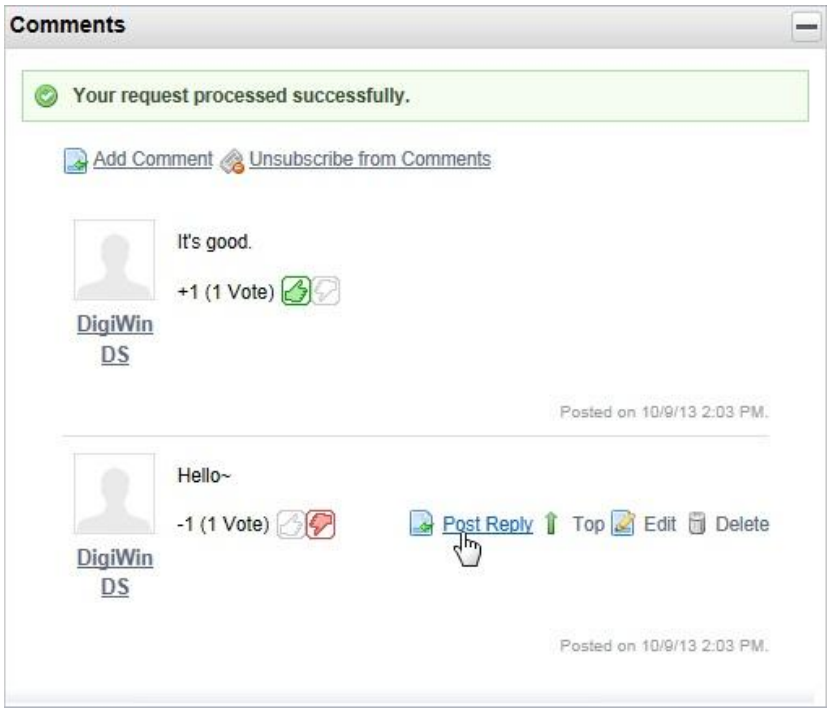
This feature enables the user to copy permission data of a particular file (hereinafter referred to as "Source file") to the designated file (hereinafter referred to as "Target file").
Setting method: Go to the "File" list and press "⌄" on the right of source file, and then select "Copy Permissions To…" to access the permission copying page. After checking target file(s) (several files can be selected at a time), click "Copy".

Tips While the permission is being copied, the original permission data of the target folder will be overwritten.

Tips While the file permission is being copied, target files are restricted to those in the same folder and do not include files in subfolders.

4.1.1.13 Comment Document

The feature enables the user to comment a file and reply to comments. Click the name of a file to access the view page. On the lower area switch to the "Comment" tab to view current comments on the file.



- Add comment: Press "Add comment" to add a comment for the file
- Post reply: Press "Post Reply" to reply to a particular comment
- Edit comment: Press "Edit" to edit the comment
- Delete comment: Press "Delete" to delete the comment
- Comment voting: Press or to vote for or against the comment

4.1.1.14 Document Rating

This feature enables the user to rate a file. Click file name to access the view page and conduct file rating. Move the cursor to the asterisk “Your rating”. When the asterisk turns pink, click the mouse to finish the rating. For example, to give a four-star rating, please click on the fourth star counted from the left, and the same applies to other ratings.

4.1.1.15 Add Shortcut

Generally speaking, the user is allowed to view files created by current community only. To view files of other communities, the user needs to set “File shortcut”.

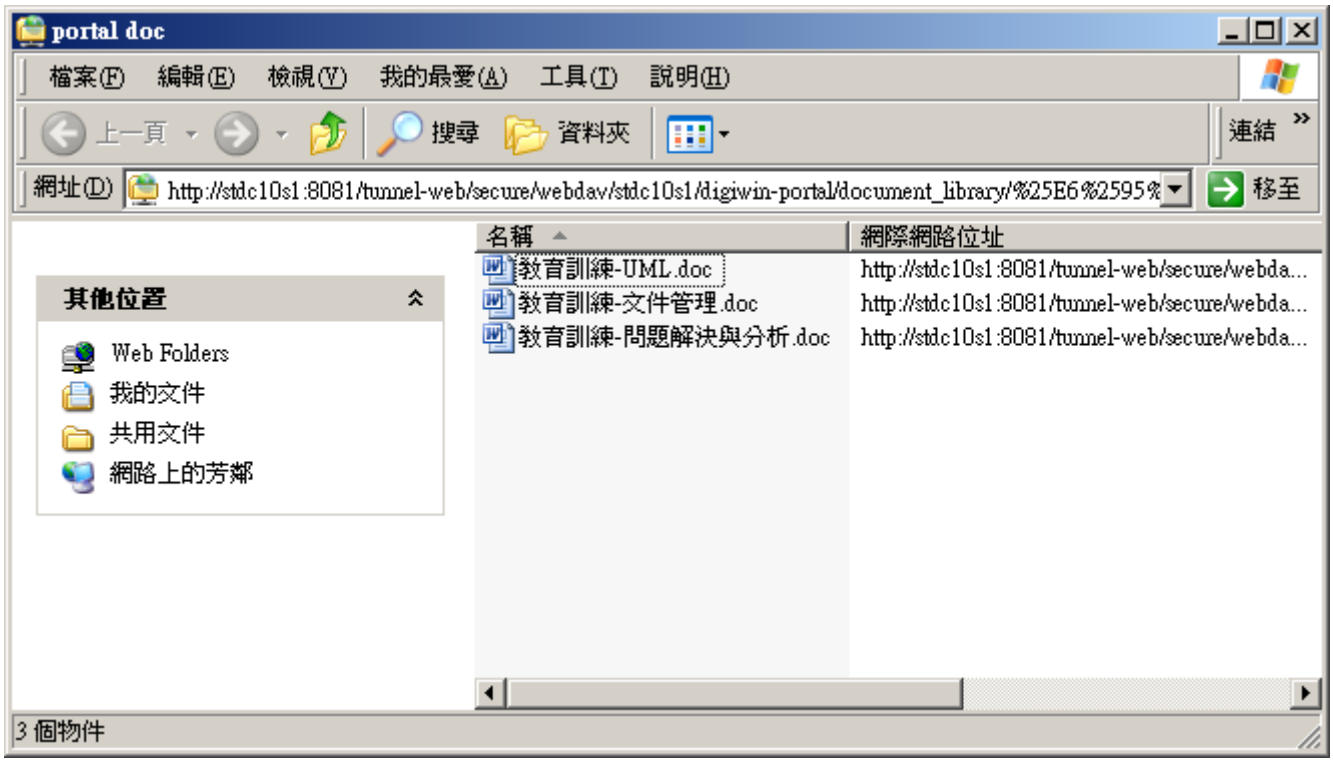
- Press the “Add” button and select “Shortcut” to access the shortcut setting page. After selecting the community and files linked by the shortcut, click “Save”.

4.1.1.16 WebDAV Access Setting

This feature allows system administrator to conduct file management through network neighborhood. Setting method:

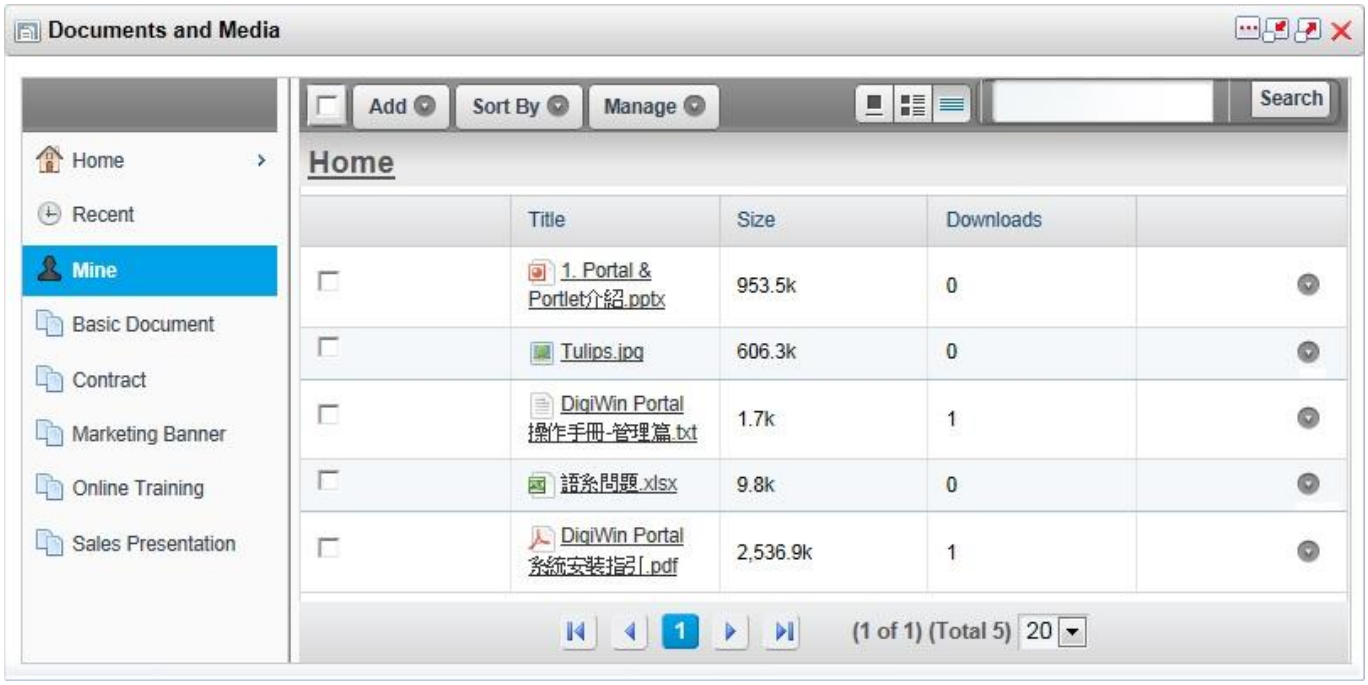
- Open “Network neighborhood” → Add a network site → Enter the folder’s WebDAV URL in “Internet or network address” → A window pops up requesting the entry of user name and password. Please enter the account and password of the user of Portal system.

- After setting, the administrator can manage folders and add, edit or delete files directly through the Web folder.



4.1.2 My Documents

Press the person icon on the left list to view all files uploaded by the user.



4.1.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Setup” to access the permission setting page.

Permission setting:

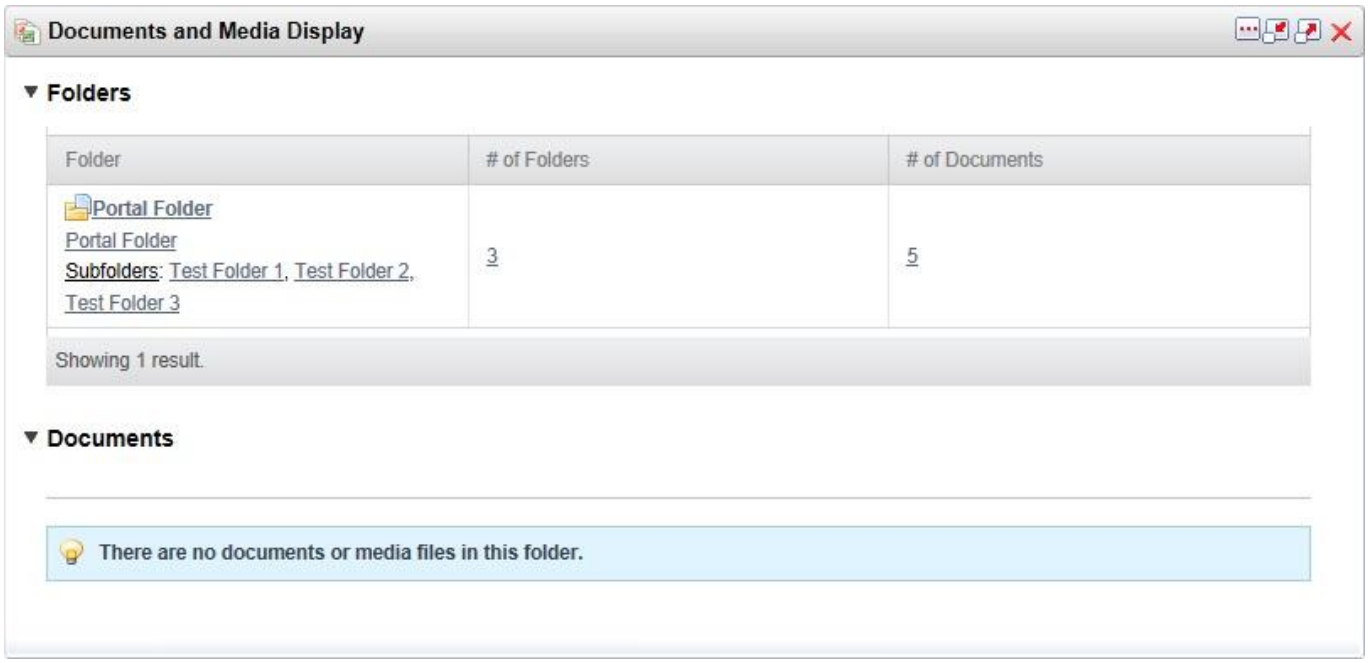
Data entity	Documents and Media Portlet
Permitted to	Display Settings (Icon, Description, list), Entries Listing (Name, Size, Downloads, Action, Created Date, Modified Date)

4.2 Documents and Media Display

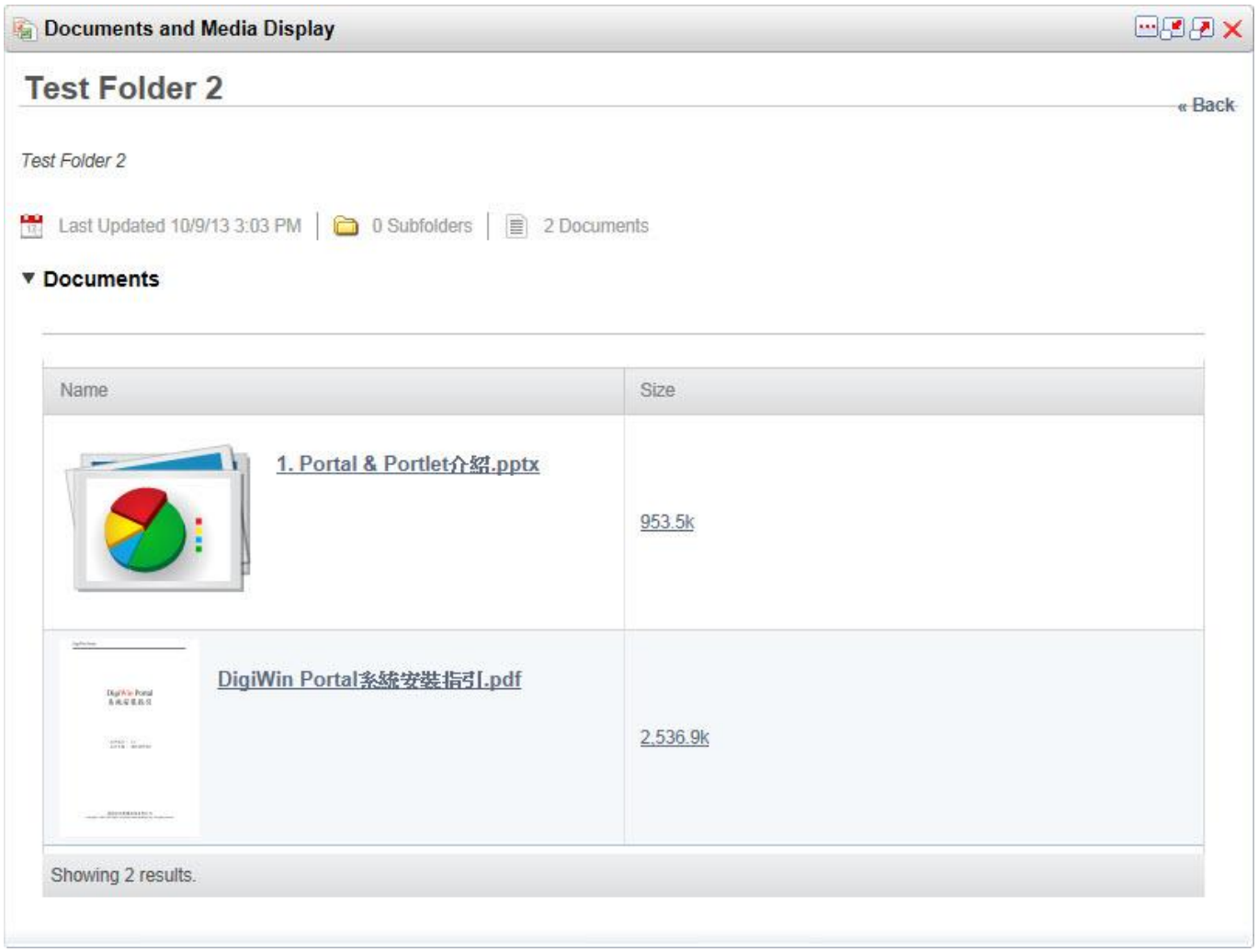
Documents and media is a simplified view mode of “Documents and Media”.

4.2.1 View Document

- View the list of file folders



- Access a folder to view the list of its subfolders and files. Press file name to view the data of the file.



4.2.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Documents and Media Display Portlet
Permitted to	Folders Listing (Folder, # of Folders, # of Documents, Name), Documents Listing (Name, Size, Downloads, Locked)

4.3 Recent Downloads

4.3.1 Recent Downloads

This feature enables the user to view the list of files recently downloaded by the user. Press the link directly to open the file.

4.3.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

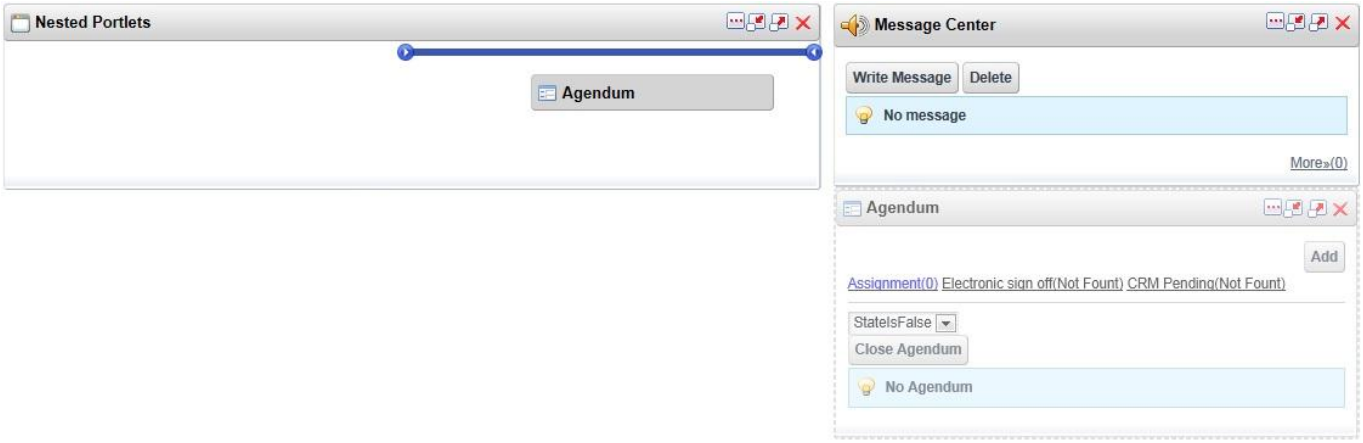
Data entity	Recent Downloads Portlet
Permitted to	Add to Page, View, Permissions, Configuration

4.4 Nested Portlets

This feature enables the user to adjust Portal interface more flexibly, lower the complexity of view configuration and permission setting, and modify Portal view more flexibly.

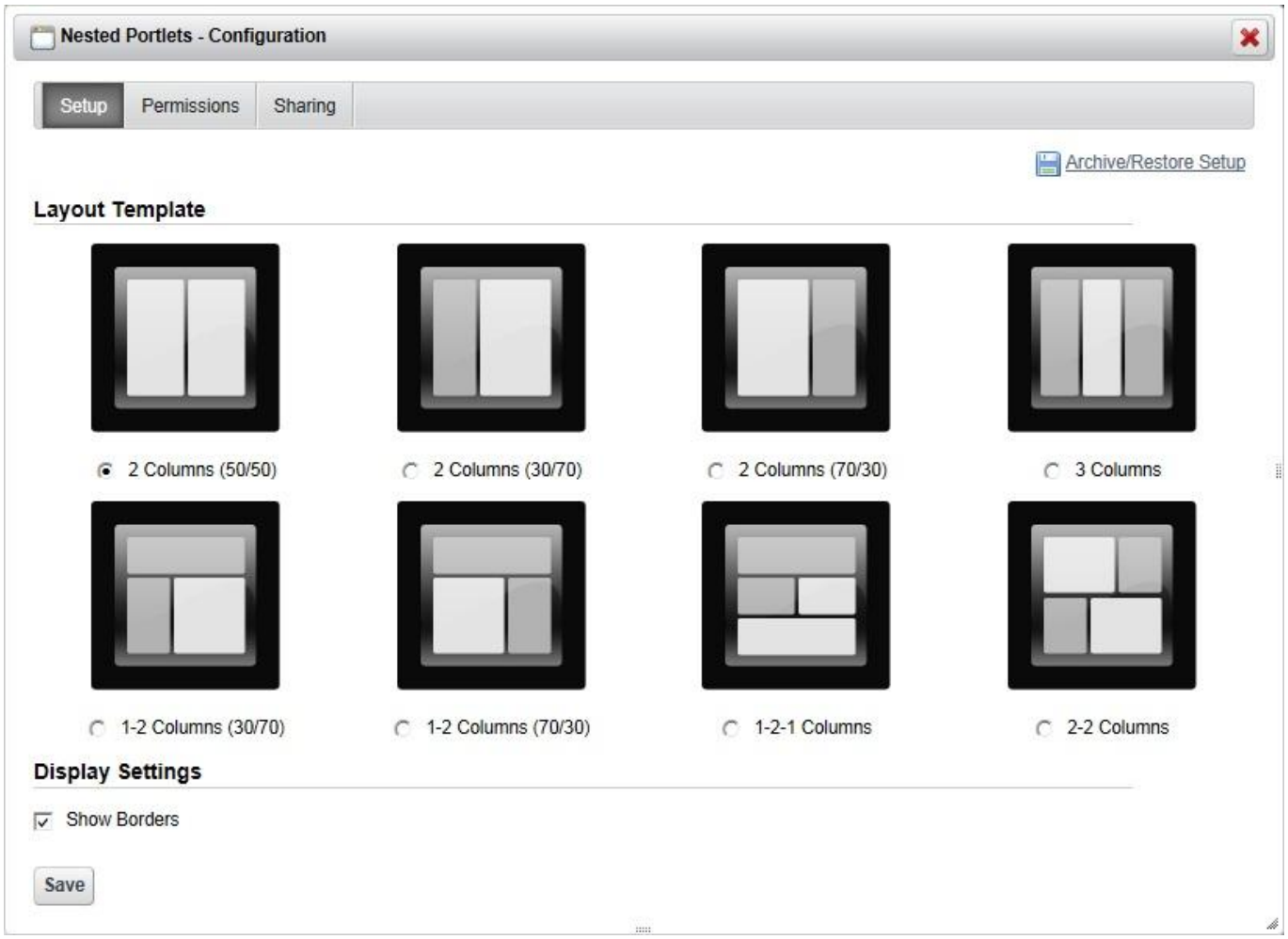
4.4.1 Add to Portlet

Drag and drop Portlet to nested Portlets.



4.4.2 View Setting

Press “Configuration” in Portlet toolbar, and a view setting window will pop up.



4.4.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Nested Portlets Portlet
Permitted to	Add to Page, View, Permission, Configuration

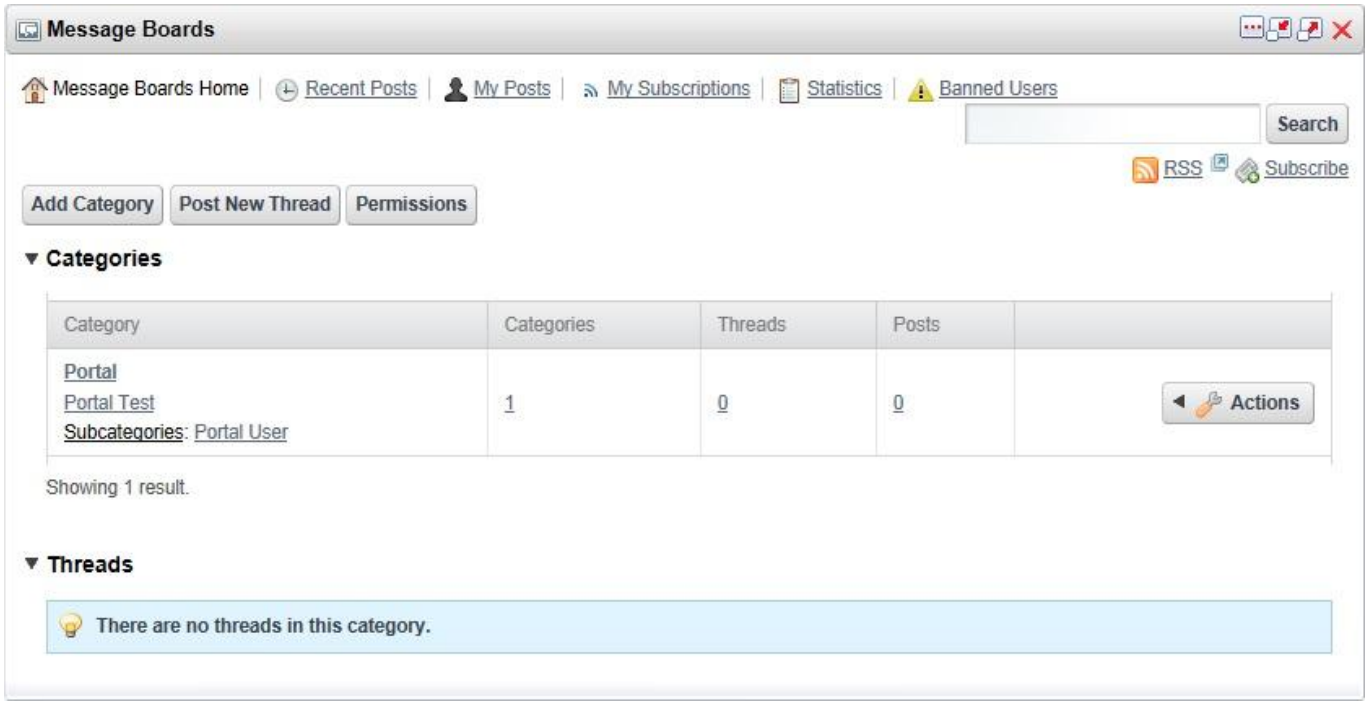
5. Collaboration

5.1 Message Boards

Message Boards provides the users with a space to discuss and publish posts.

5.1.1 Manage Categories and Threads

The “Categories” area will display sategories currently created in the forum and threads and the quantity of posts for each type.

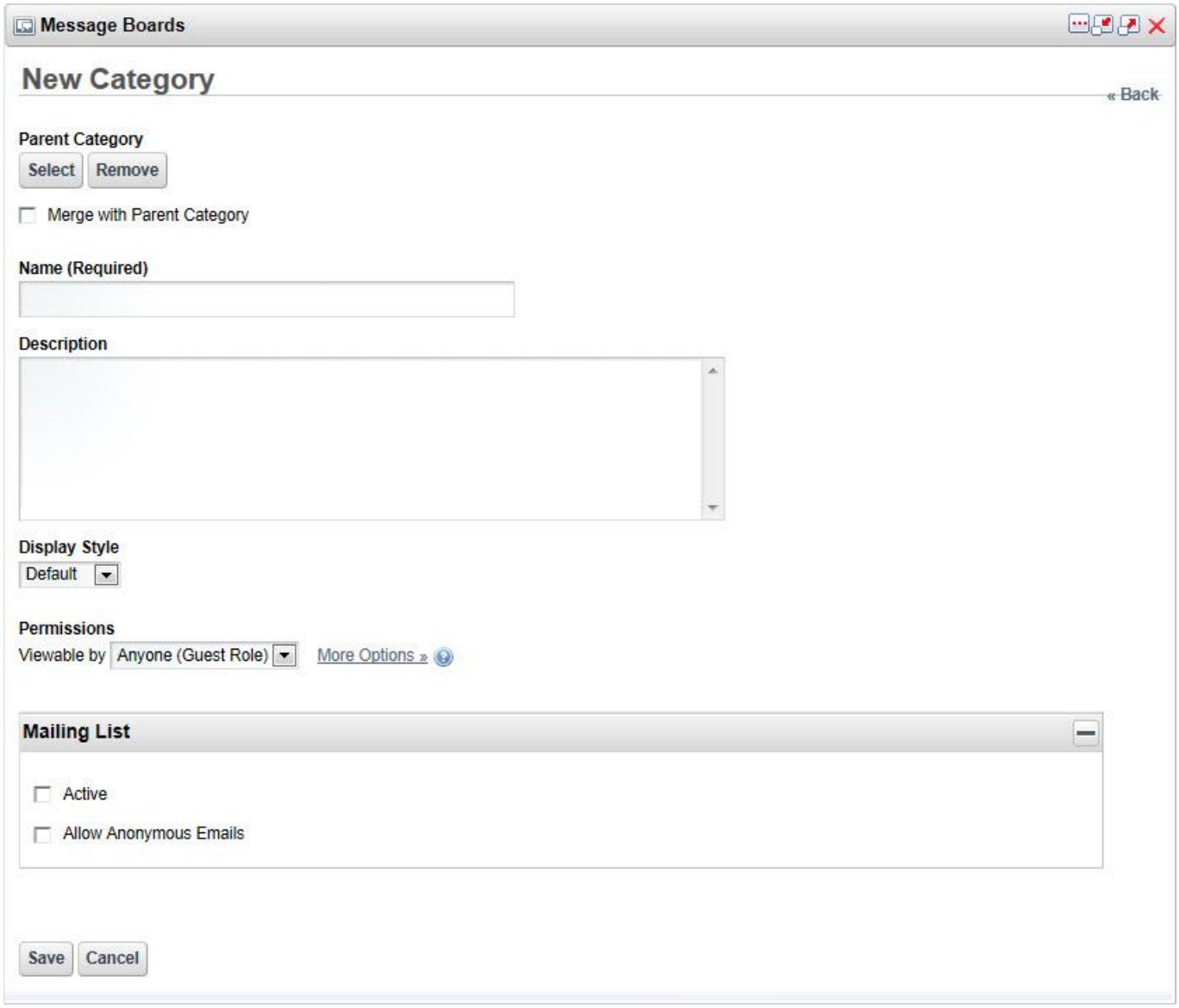


5.1.1.1 Search Category

After entering the keyword of type name, post topic or content in search field, press “Search” to search out related types.

5.1.1.2 Add Category

Press “Add Category” to open the add type page. After entering related data, click “Save”.



- Name: Enter type name of the forum
- Description: Enter type description of the forum
- Select pattern: Select type pattern of the forum
- Permissions: Check “Public” to show it is a public type. Press “Configuration” to set the permission of the type

5.1.1.3 Add Subcategory

After accessing a particular type, press “Add Subcategory” to add subcategory under the category. For categorydata entry method, refer to the previous section.

5.1.1.4 Control Category

Press “Actions” that follows the data entry of “Category” to control the type.

- Edit: Press “Actions” on the right of data entry and then select “Edit” to access the Edit page. Edit the following:
  - Parent Category: This type can be used as a subtype of other categories. Press “Select” or “Remove” to set parent category
  - Merge with Parent Category: This category can be merged with parent category. After merger, posts in the original category will be all transferred to parent category and the original category will be automatically deleted
- Permissions: Press “Actions” on the right of data entry and then select “Permissions” to access the category’s user permission setting page

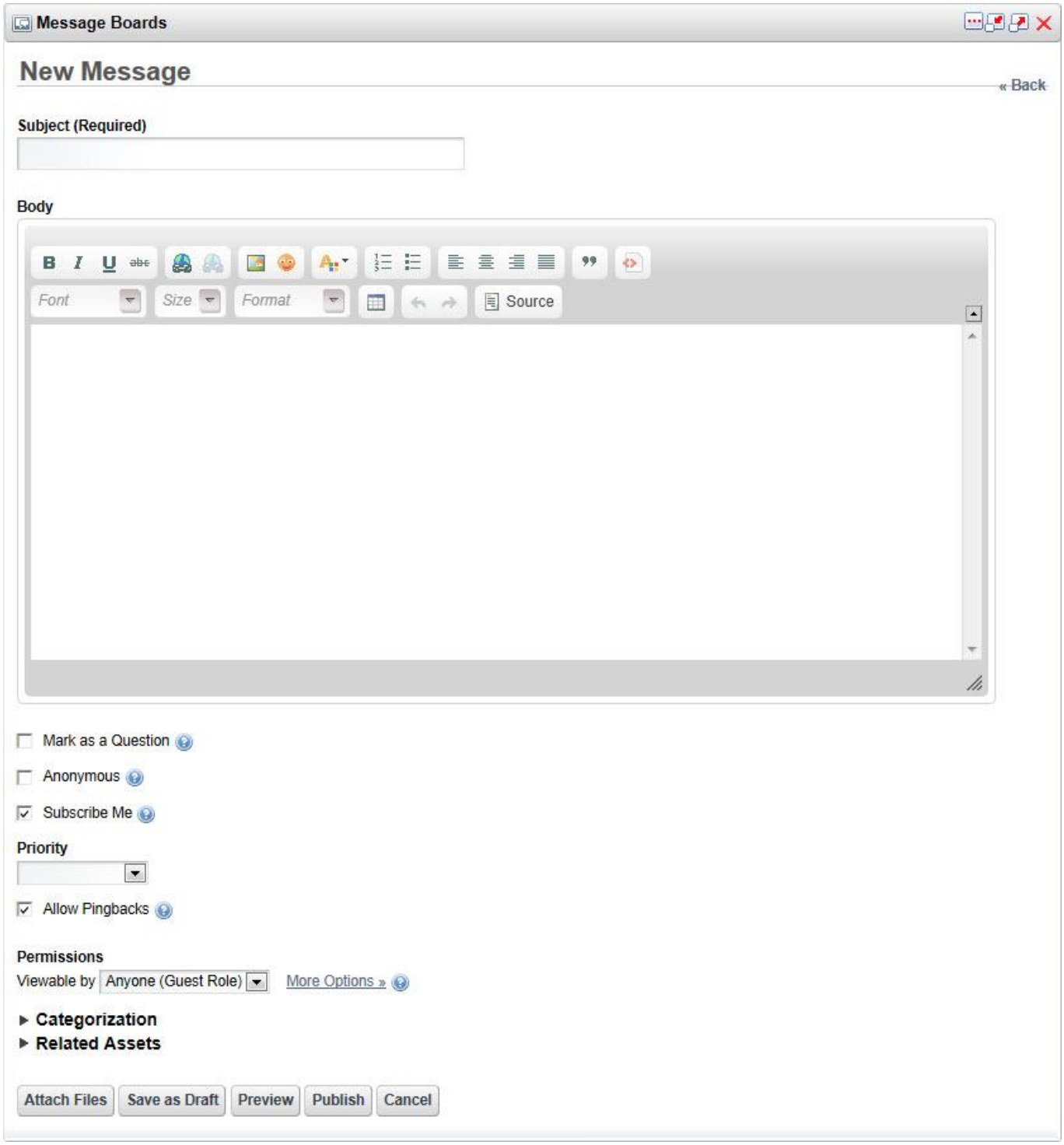
  Permission setting:

Data entity	Message Boards Category
Permitted to	Add File, Add Message, Add Subcategory, Delete, Lock Thread, Move Thread, Permissions, Reply to Message, Subscribe, Update, Update Thread Priority, View

- RSS: Press “Actions” on the right of data entry and then select “RSS” to subscribe to the corresponding RSS
- Subscribe: Press “Actions” on the right of data entry and then select “Subscribe” to subscribe to the type; To cancel the subscription, press “Cancel subscription”. In case of any new post published or any other change in the corresponding forum subscribed, the subscriber will be notified via E-mail.
- Delete: Press “Activity” on the right of data entry and then select “Delete” to delete the type

5.1.1.5 Publish Post

After accessing a certain forum, press “Post New Thread” to open the publish post page and create a new discussion thread.



- Subject: Topic of the post
- Body: Content of the post. During editing, use the toolbar on the top for arrangement or pattern setting
- Mark as a Question: Check this to mark any response to the post as an answer

- Anonymous: Check this to publish the post anonymously
- Permissions: Set the permission of the post
- Attach Files: Press “Attach Files” to upload attachments. Press “Remove” to remove all uploaded attachments of the post.

After editing, press “Preview” to view the latest display of the post. To publish the post, please press “Publish”.

5.1.1.6 Reply to Post

In the post view page, press “Reply” or “Reply with Quote” to reply to the post.
The edit method of a reply is the same as that of publishing posts. Please refer to the previous section.

5.1.1.7 Control Discussion Thread

Thread	Flag	Started By	Posts	Views	Last Post	
Based on Valve's Portal		DigiWin DS	1	14	Date: 10/9/13 5:30 PM By: DigiWin DS	Actions

- Edit: Press “Actions” on the right of data entry and then select “Edit” to access the edit page
- Permissions: Press “Actions” on the right of data entry and then select “Permission” to access the topic’s user permission setting page

  Permission setting:

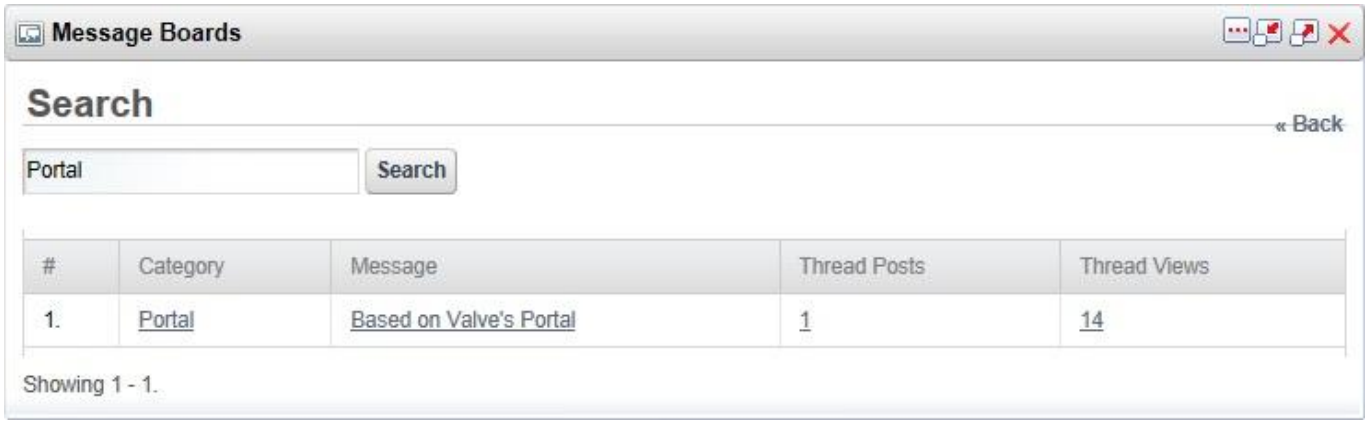
Data entity	Discussion topic
Permitted to	Delete, Update, Permissions, View, Subscribe

- RSS: Press “Actions” on the right of data entry and then select “RSS” to subscribe to the corresponding RSS
- Subscribe: Press “Actions” on the right of data entry and then select “Subscribe” to subscribe to the topic. To cancel the subscription, press “Unsubscribe”

- Lock Thread: It allows topic locking and the locked topic cannot be edited.
- Move Thread: Press “Actions” on the right of data entry and then select “Move Thread” to move the topic to other types
- Delete: Press “Actions” on the right of data entry and then select “Delete” to delete the thread

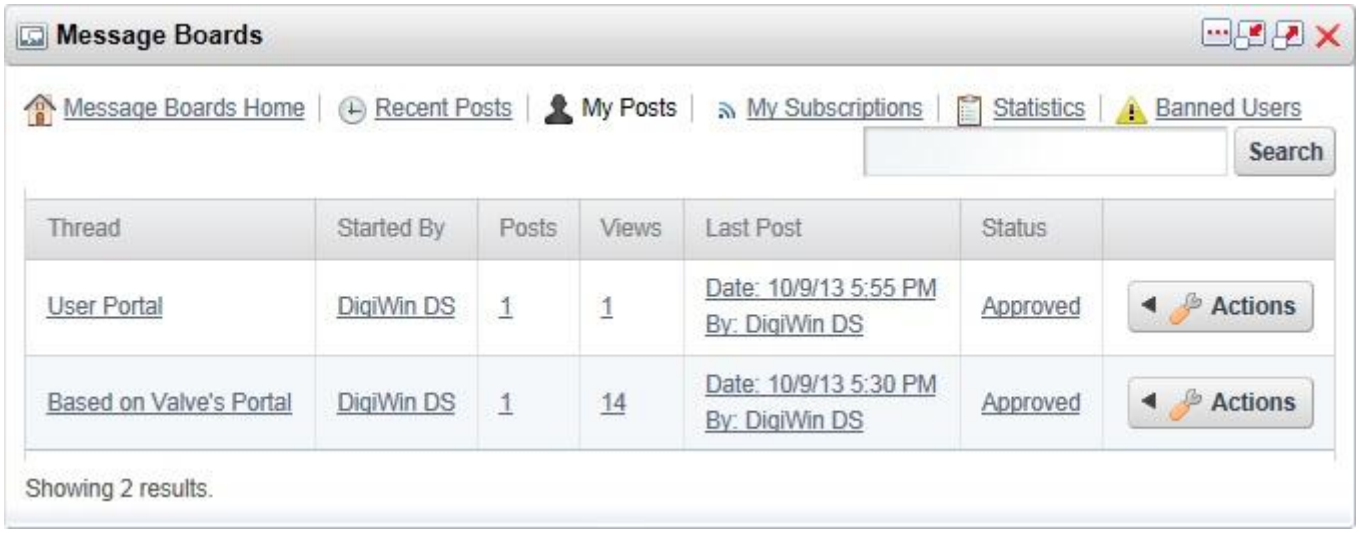
5.1.1.8 Search Thread

After accessing a category, enter the keyword and then press “Search the type” to search out related posts.
※For search condition setting, please refer to “Search file” under “File management”.



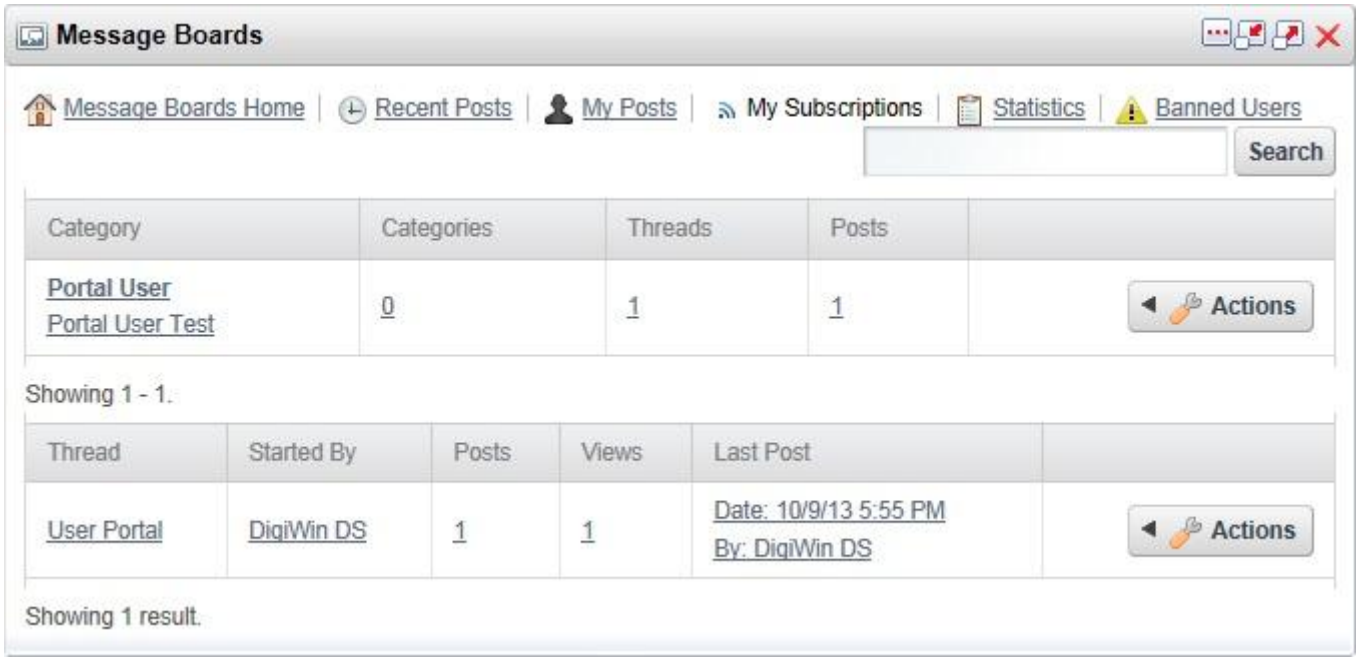
5.1.2 My Posts

Press “My Posts” tab to view all posts published by the user.


Message Boards
Message Boards Home | Recent Posts | My Posts | My Subscriptions | Statistics | Banned Users
Search
Thread Started By Posts Views Last Post Status
User Portal DigiWin DS 1 1 Date: 10/9/13 5:55 PM By: DigiWin DS Approved Actions
Based on Valve's Portal DigiWin DS 1 14 Date: 10/9/13 5:30 PM By: DigiWin DS Approved Actions
Showing 2 results.

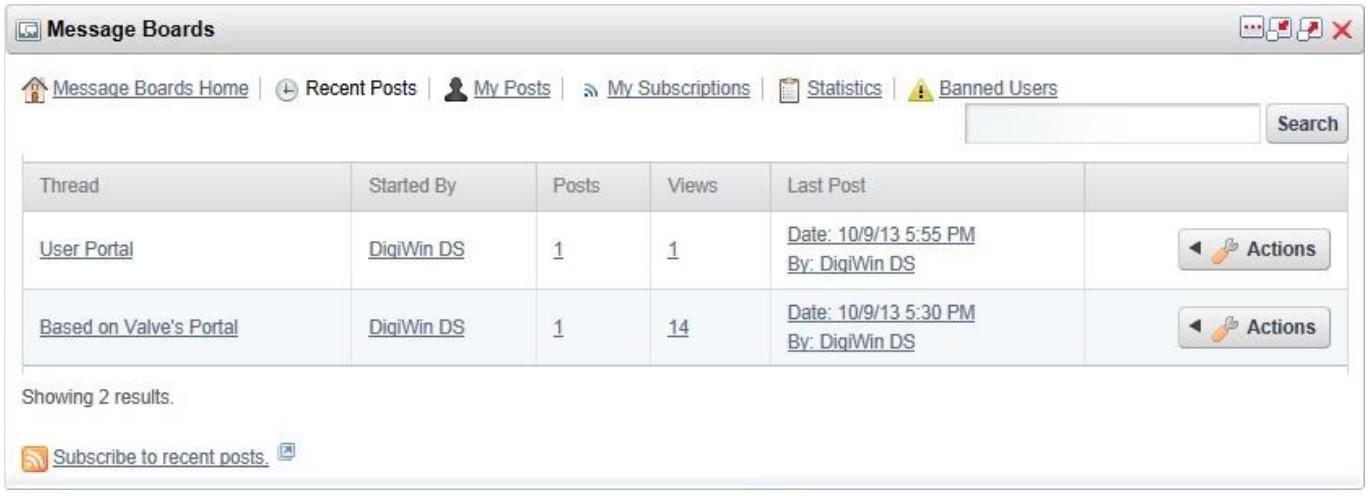
5.1.3 My Subscription

Click “My Subscriptions” tab to view the categories of discussions and threads of posts to which the user subscribes.



5.1.4 Recent Posts

Click “Recent Posts” tab to view the threads of discussions that have been published recently.

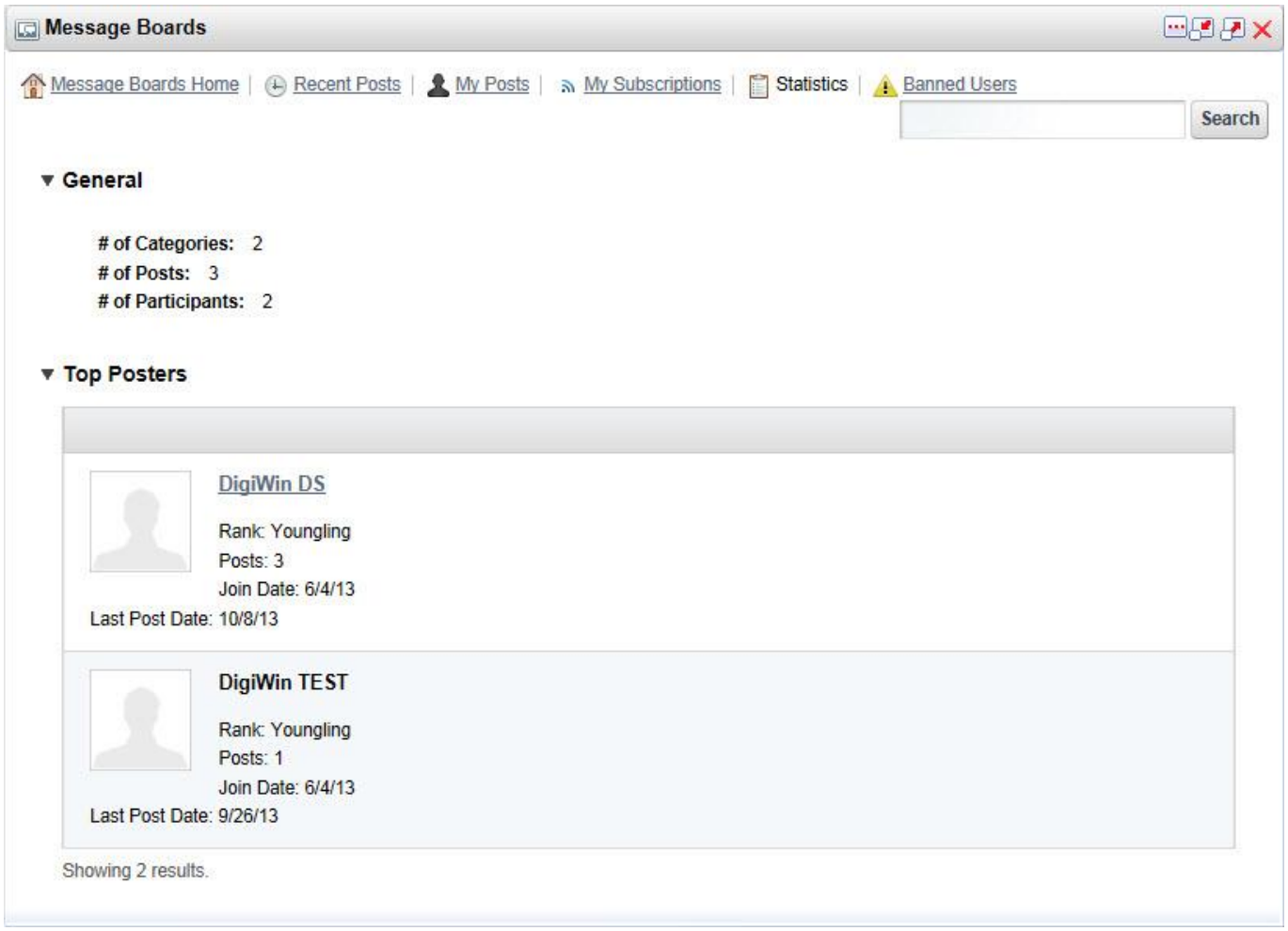


5.1.5 Statistics

Click “Statistics” tab to view types already created in the forum, quantity statistics on published posts and participants, and the ranking of published posts.

5.1.5.1 General Statistics

Click “Statistics” to view types already created in the forum, quantity of published posts and participants and the ranking on quantity of published posts.



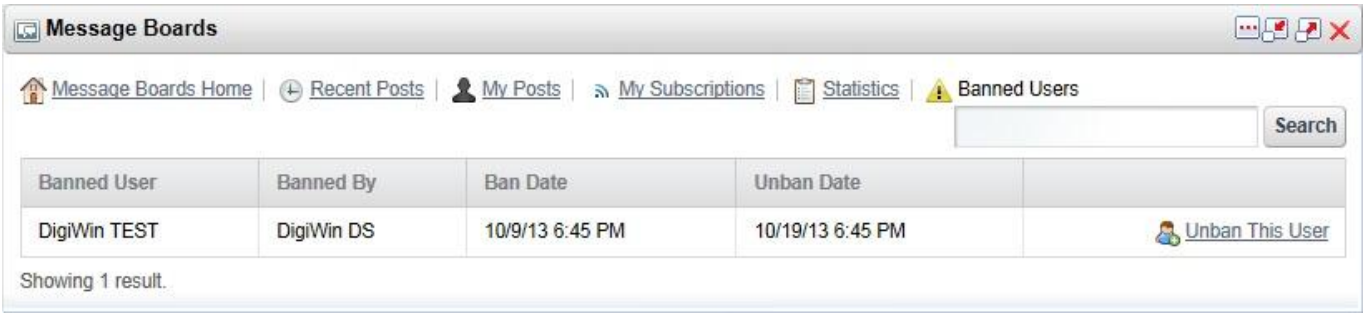
5.1.6 Banned Users

5.1.6.1 Ban the User

If message boards administrator finds any inappropriate post published, click “Ban This User” to temporarily deny the user access to the forum. The user cannot use the forum until the suspension period expires or the administrator cancels the suspension.

5.1.6.2 View the List of Banned Users

Click “Banned Users” to view the list of currently suspended users, date of suspension and expected date of suspension cancellation.



5.1.6.3 Unban Users

The suspended user has no access to the forum during the suspension period. The user cannot use the forum until the suspension period expires or the administrator cancels the suspension.
To restore the access of the suspended user, click “Unban This User” that follows the data entry of “Banned Users”.

5.1.7 Portlet Permission Setting

Click Portlet’s “Permissions” to access the permission setting page.

Permission setting:

Data entity	Message Boards Portlet
Permitted to	Add Category, Add File, Add Message, Ban User, Move Thread, Lock Thread, Permissions, Reply to Message, Subscribe, Update Thread Priority, View

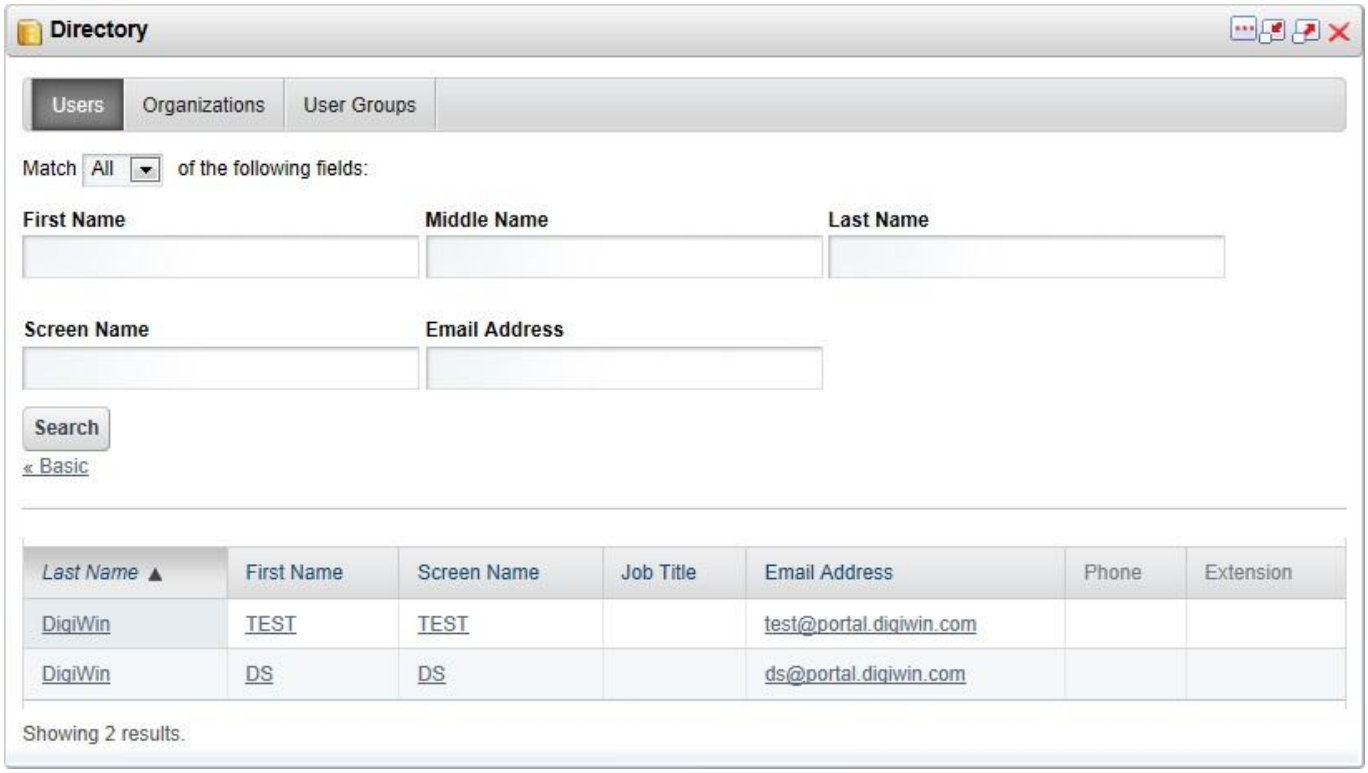
5.2 Directory

This feature enables the user to view basic information on users, organizers and user group of Portal system.

5.2.1 Users

Select “Users” tab, enter the keyword of search conditions and then press “Search”. Results that meet the conditions will be listed below.

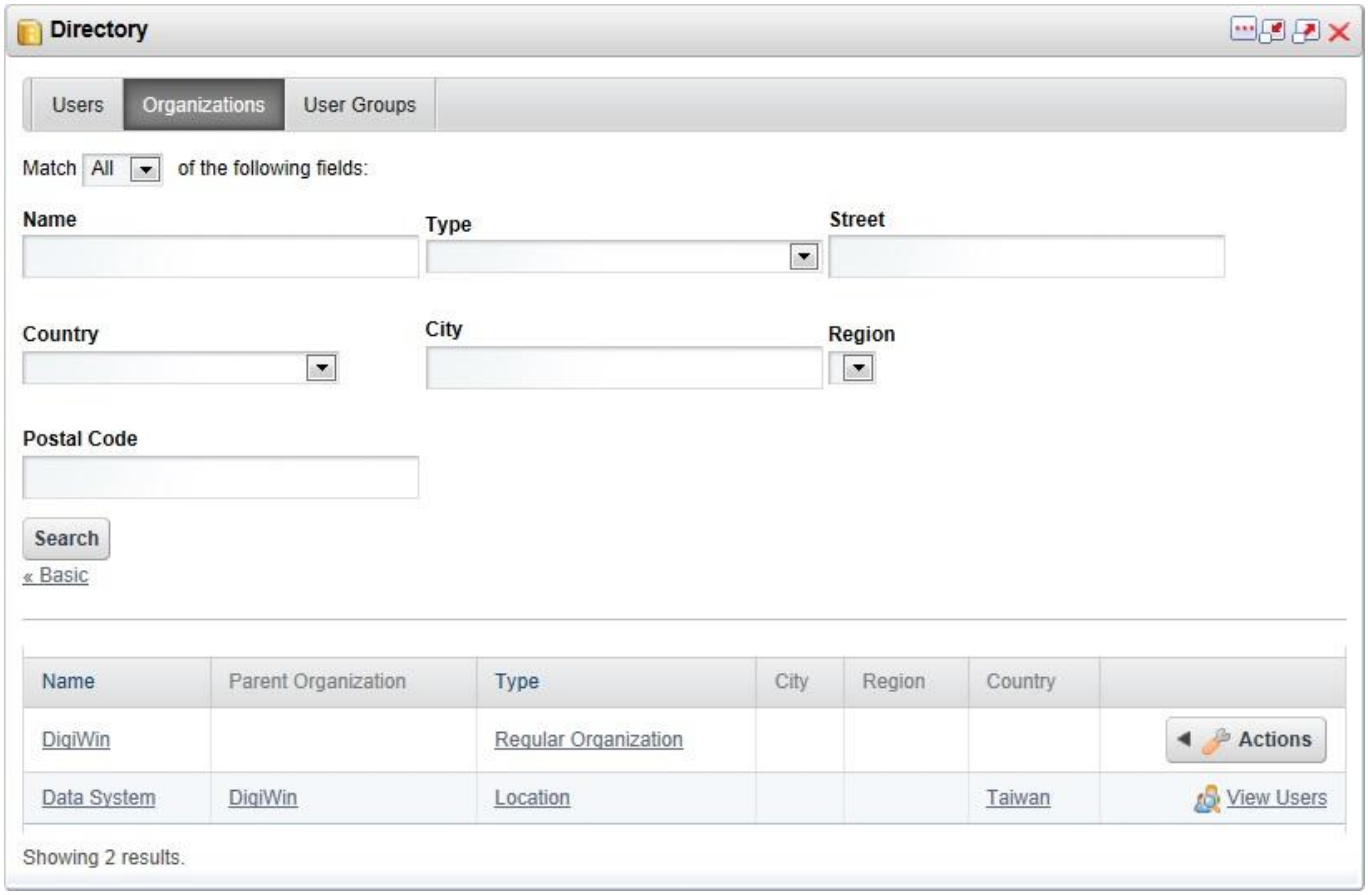
- Search conditions that may be entered include: User’s first name, middle name, last name, screen name, and Email address.



5.2.2 Organizations

Click “Organizations” tab, enter the keyword of search conditions and then click “Search”. Results that meet the conditions will be listed below.

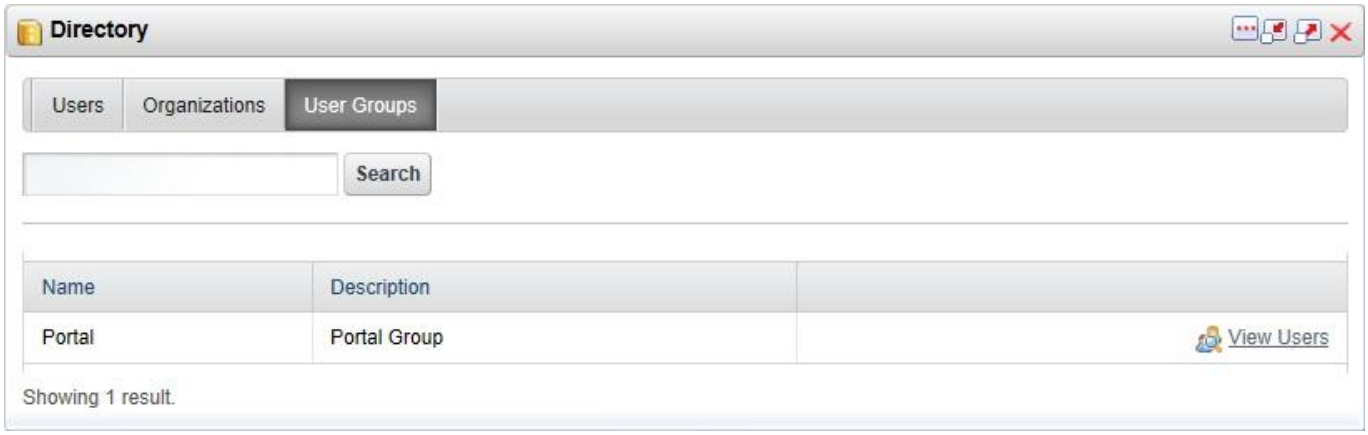
- Search conditions that may be entered include: Name, street, city, postal code, type, country and region of the organization.
- Press “View Users” that follows the data entry to view users that currently belong to the organization.



5.2.3 User Groups

Click “User Groups” tab, enter the keyword of search conditions and then press “Search”. Results that meet the conditions will be listed below.

- Press “View Users” that follows the data entry to view users that currently belong to the user group.



5.2.4 Portlet Permission Setting

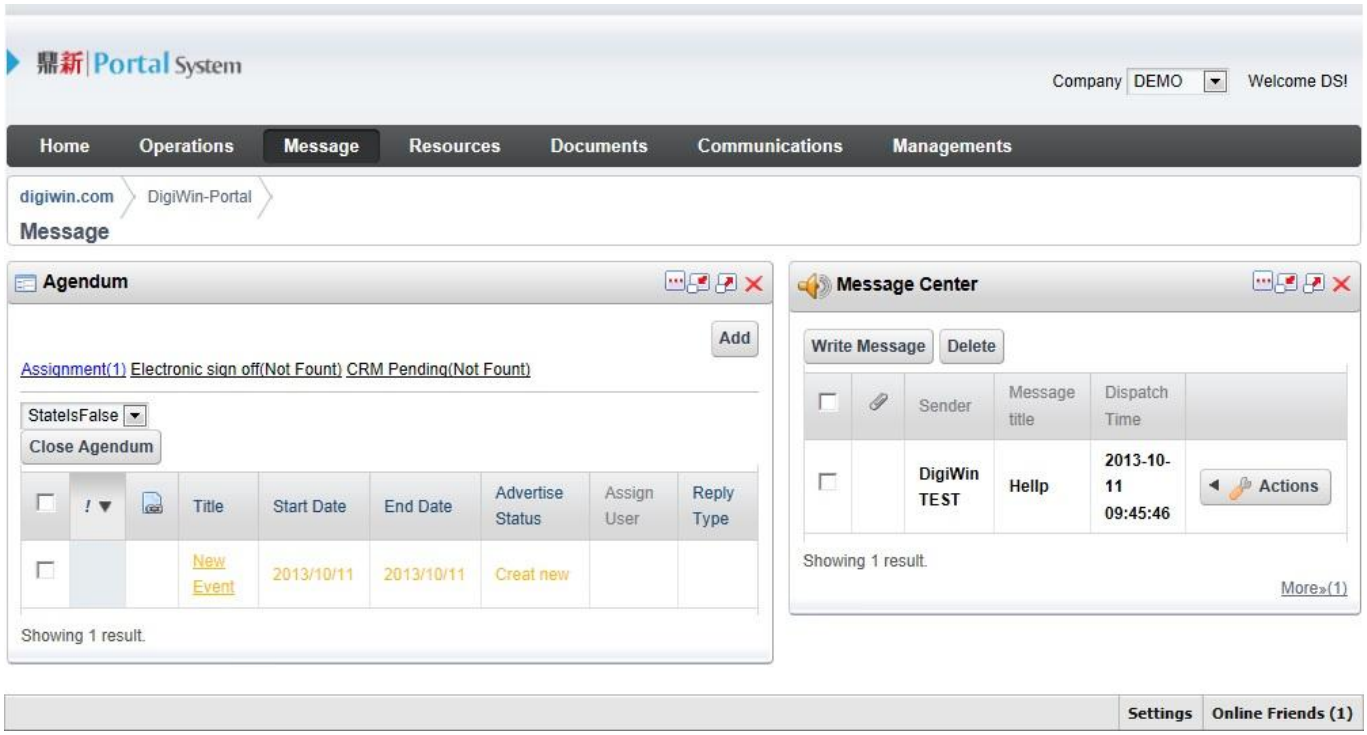
Click “Configuration” in the Portlet toolbar and then select the “Permissiona” to access the permission setting page.

Permission setting:

Data entity	Contact information Portlet
Permitted to	Add to Page, View, Permissions, Configuration

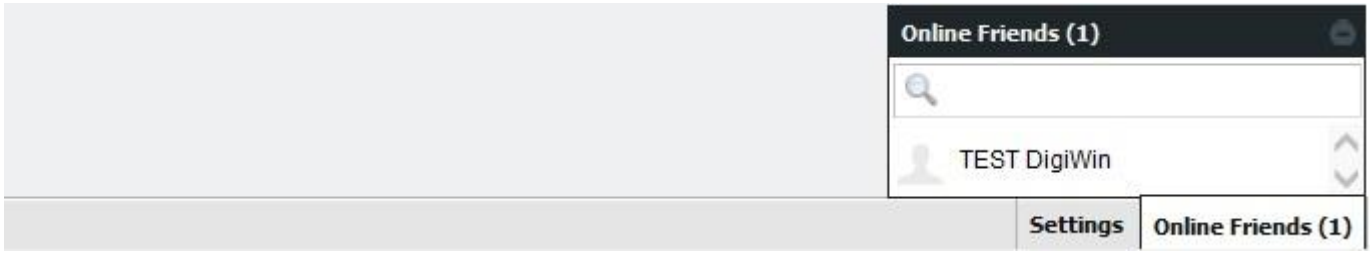
5.3 Online Messaging

The operation area of online messaging is at the bottom of page, and enables the user to send message(s) to other online users of Portal.



5.3.1 View Online Users

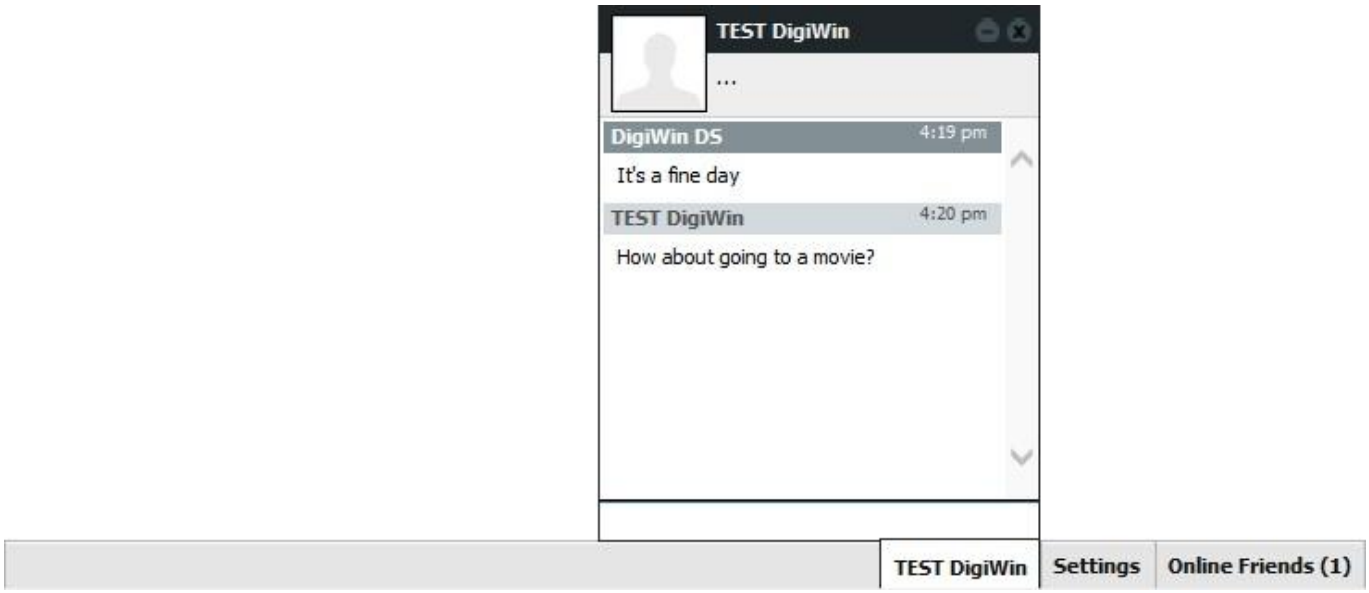
The number in parentheses behind “Online Friends” means the number of currently online users of Portal system (excluding the user himself/herself). Click “Online friends” to view the list of online users.



5.3.2 Send Message

Tips The message is in pure text only, without emoticons. Pictures and files cannot be sent.

Messages can be sent to currently online users of Portal only, and cannot be sent to offline users. Select the object to whom to send the message from the list of online users to open the dialogue box. Enter message text in the input box below and press “Enter” to send the message.



If several new messages are received at a time, the system will show the count of new messages.

Messaging with several persons is allowed. (Only one-to-many is allowed and group talk is not allowed)

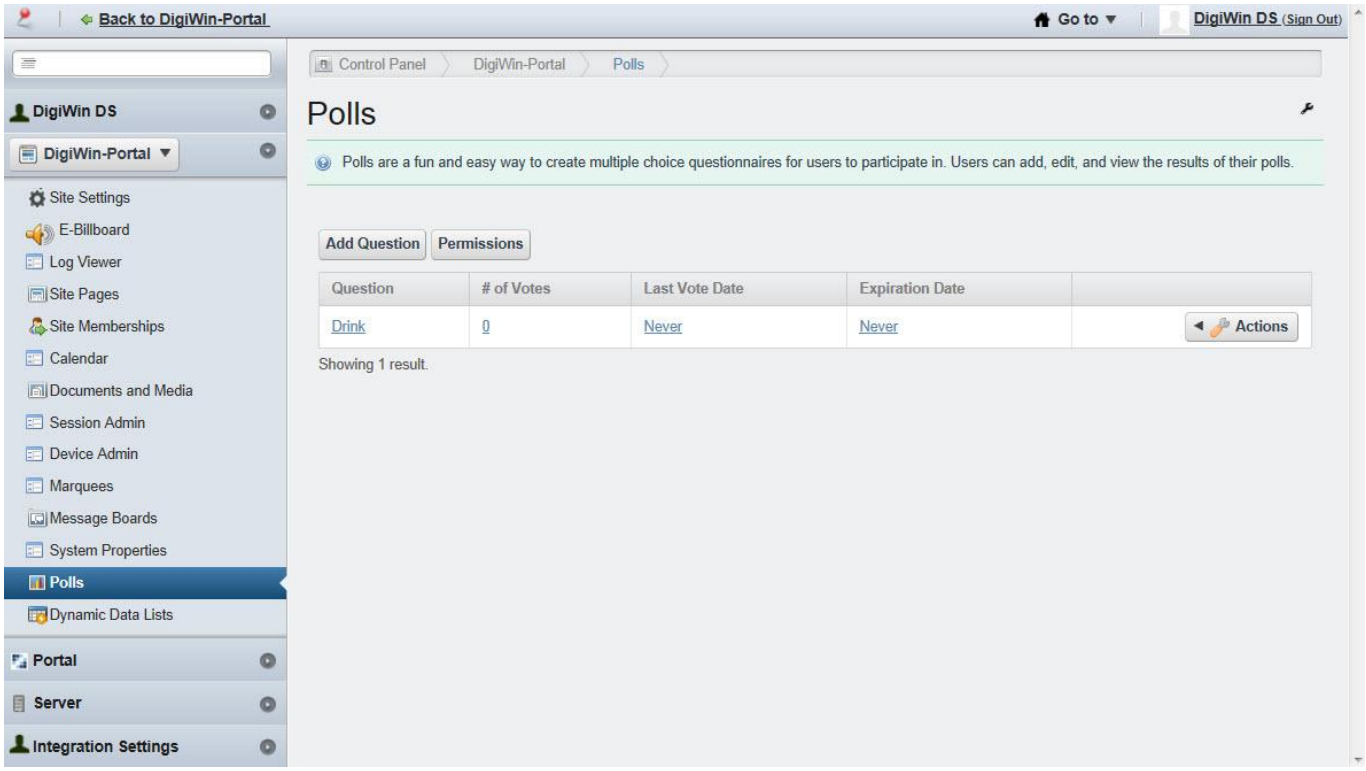
5.3.3 Preferences

Click “Settings” to open the preferences page. After setting, click “Save”.

- Alias/sharing message: Enter the user’s alias or sharing message to enable other users to see this message in the dialogue box
- Show me as online: Check it to let other users know the user is online on “Online friends”
- Play a sound when I receive a new message in a hidden window: Check it to play the alert tone when a new message is being received in the closed dialogue box

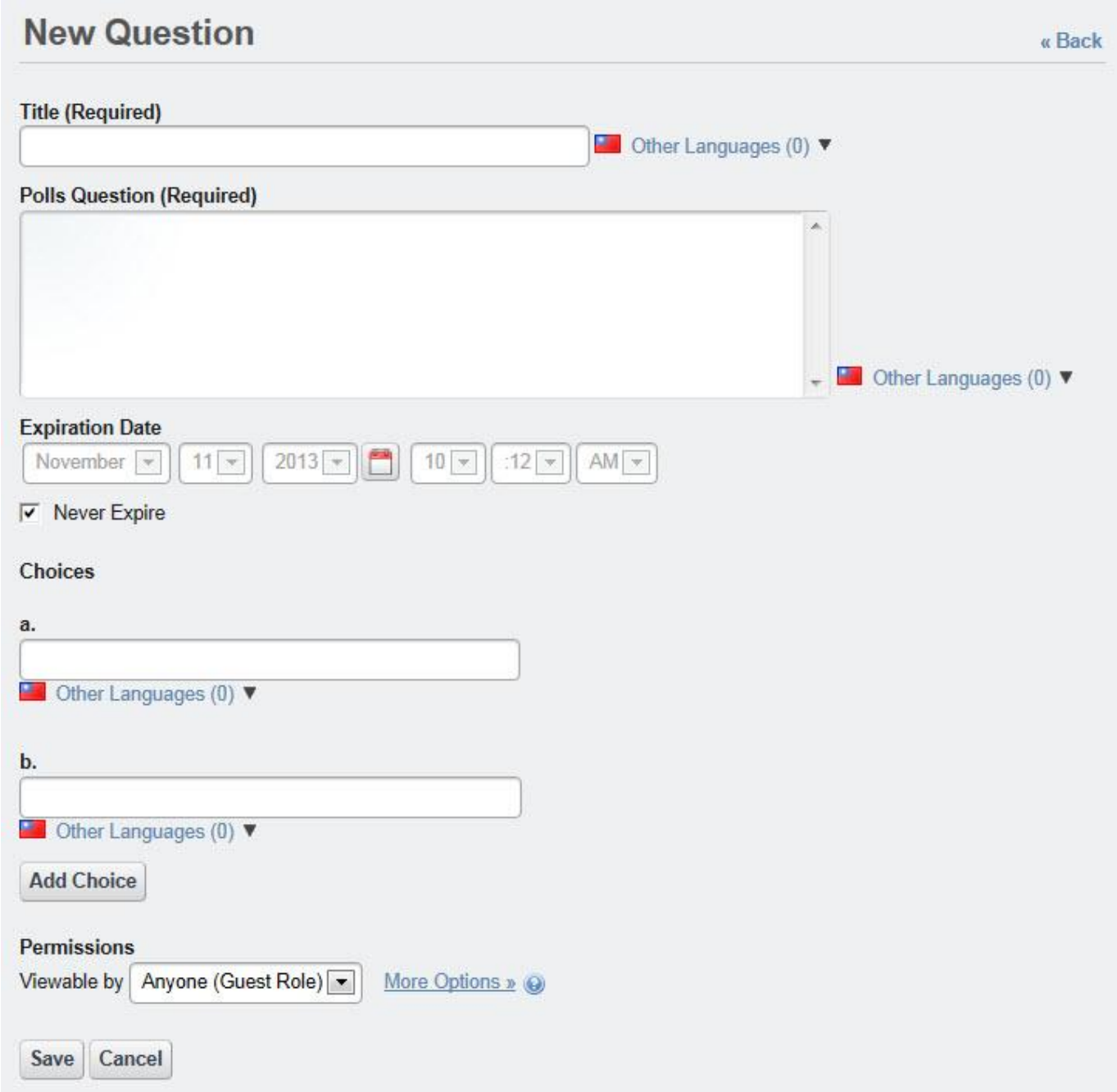
5.4 Polls Management

This feature enables the user to manage voting topics.



5.4.1 Add Poll Topic

Press “Add Question” to access the view of voting topic setting. After entering related data, click “Save” to finish the addition of voting topic.



- Title: Enter the topic of a voting activity
- Polls Question: Enter the question of a voting activity
- Expiration Date: Set the deadline of the voting activity. If there is no deadline, please check “No deadline”
- Choices: Set voting options. Click “Add option” to add a new option, and click “Delete” to remove the option
- Permissions: Click “Setting” to set the user permission to the voting activity

5.4.2 Control Poll Topic

- Edit: Press “Actions” on the right of data entry and then select “Edit” to access the Edit page.
- Permissions: Click “Actions” on the right of data entry and then select “Permissions” to set the user permission to the poll topic.

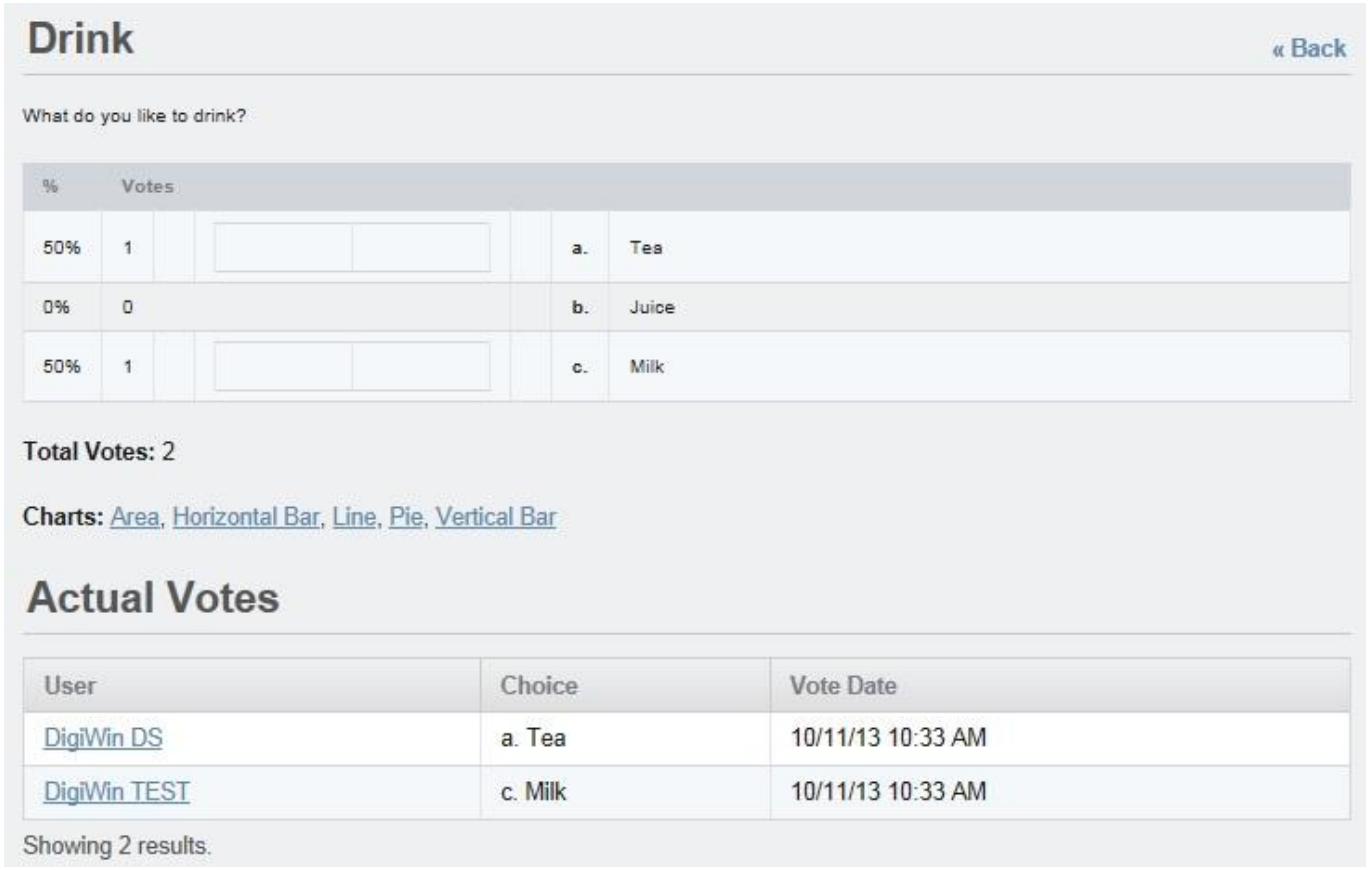
  Permission setting:

Data entity	Voting topic
Permitted to	Delete, Add Vote, Update, permissions, View

- Delete: Press “Actions” on the right of data entry and then select “Delete” to delete the voting topic.

5.4.3 View Polls Results

Click a data entry of the voting question to view the actual voting result of the topic.


Drink
« Back
What do you like to drink?
% Votes
50% 1 a. Tea
0% 0 b. Juice
50% 1 c. Milk
Total Votes: 2
Charts: Area, Horizontal Bar, Line, Pie, Vertical Bar
Actual Votes
User Choice Vote Date
DigiWin DS a. Tea 10/11/13 10:33 AM
DigiWin TEST c. Milk 10/11/13 10:33 AM
Showing 2 results.

- Polls Results: Display the number and percentage of votes obtained for each option
- Charts: Display voting results in diagrams. Diagram types available: Area, Horizontal/Vertical Bar, Line, Pie
- Actual Votes: Display the name, selection and voting date for users who have voted

5.4.4 Polls Permission Setting

Press Polls “Permissions” to access the permission setting page.

Permission setting:

Data entity	Polls Management
Group level	Users, Organizations, User Groups, Regular Roles, Site Roles, Site, Guest
Permitted to	Add Question, Permissions

5.5 Polls Display

After adding a voting topic in “Polls Management”, the administrator needs to set voting topic in “Polls Display” Portlet to enable users to participate in voting activity. For general information, please refer to “DigiWin Portal Operating Instructions”.

5.5.1 Set Polls Interface

After adding a voting topic in “Polls Management”, the administrator needs to set the voting topic in “Polls Display” Portlet to enable the users to participate in voting activity.
Press “Setting” in “Voting” toolbar to access the setting page. Select “Question” and then click “Save” to finish the setting.

Tips The same page can hold several “Polls” Portlets at a time to display different voting topics.

5.5.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Polls Display Portlet
Permitted to	Add to Page, View, Permissions, Configuration

Tips Permission to “View” means the ability to view the voting topic and to cast a vote.

After the voting topic is set, the following permission is available by default: Guest has the permission to “view”.

5.6 Marquees

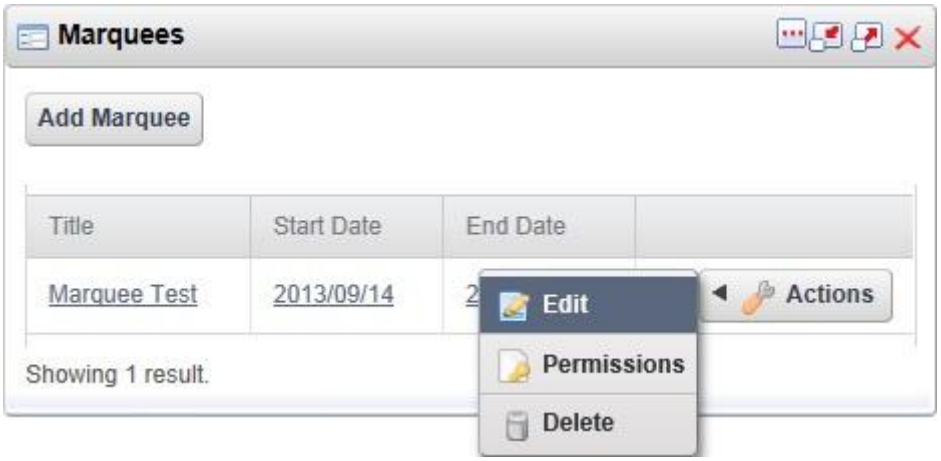
This feature enables the user to manage marquee information.

5.6.1 Add Marquee Message

Press “Add Marquee” to access the marquee message setting view. After entering related data, click “Save”.

- Title: Enter the title of a marquee
- Content: Enter the content of marquee message
- Duration: Set the playing period of the marquee message

5.6.2 Control Marquee Message



- Edit: Press “Actions” on the right of data entry and then select “Edit” to access the Edit page.
- Permissions: Click “Actions” on the right of data entry and then select “Permissions” to set user permission of the marquee message.

Permission setting:

Data entity	Marquee data
Permitted to	View, Permissions

Tips The permission to “View” marquee data is limited to the corresponding marquee message only.

For example: User A is set to have permission to view a particular marquee message while User B is not. Therefore, User A can see the marquee message but User B cannot.

- Delete: Click “Actions” on the right of data entry and then select “Delete” to delete the marquee message.

5.6.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

Data entity	Marquee management Portlet
Permitted to	action.ADDMARQUEE, Access in Control Panel, Add to Page, View, Permissions, Configuration

5.7 Marquee Display

5.7.1 Set Marquee Interface

After adding a marquee message in “Marquee management” Portlet, the administrator needs to set a marquee playing interface in “Marquee Display” Portlet to enable the user to read the marquee message. Press “Configuration” in “Marquee Display” toolbar to access the setting page. After entering related information, click “Save”. For general information, please refer to “DigiWin Portal Operating Instructions”.

Tips The same page can hold several “Marquee Display” Portlets at a time to play the information of different marquees.

5.7.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

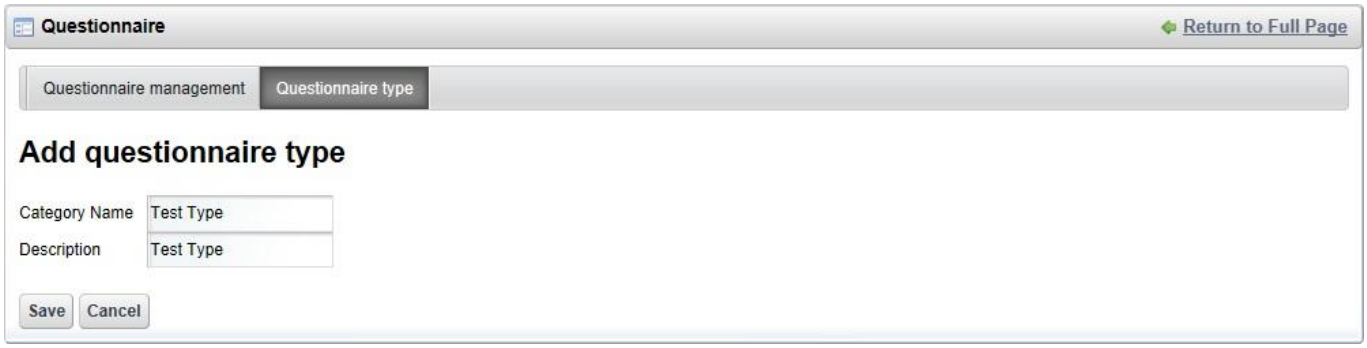
Data entity	Marquee Portlet
Permitted to	Add to Page, View, Permission, Configuration

5.8 Questionnaire

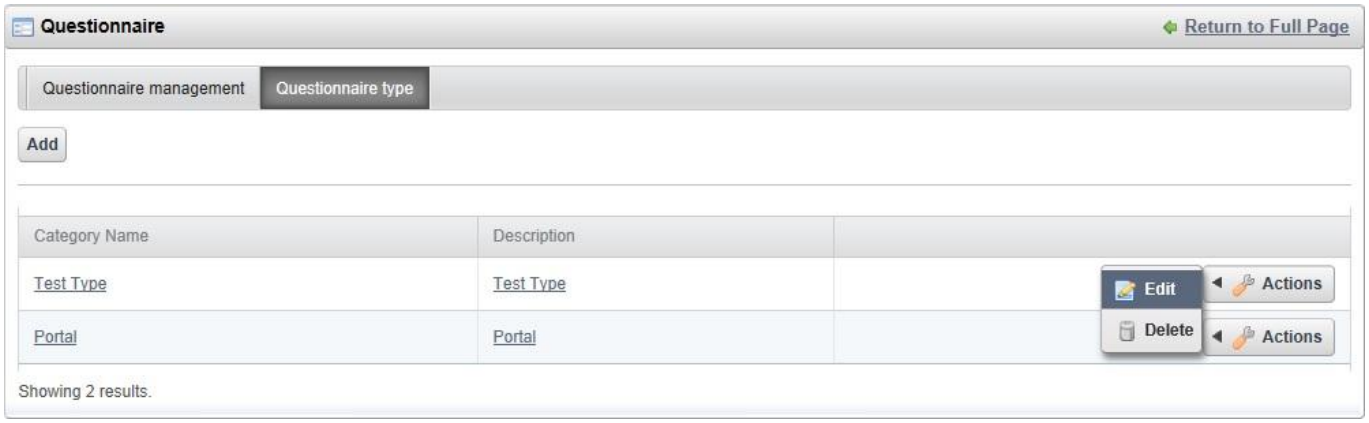
This feature enables the administrator to create, manage and control questionnaires.

5.8.1 Set Questionnaire Type

- Add a questionnaire type, and type name must not be blank

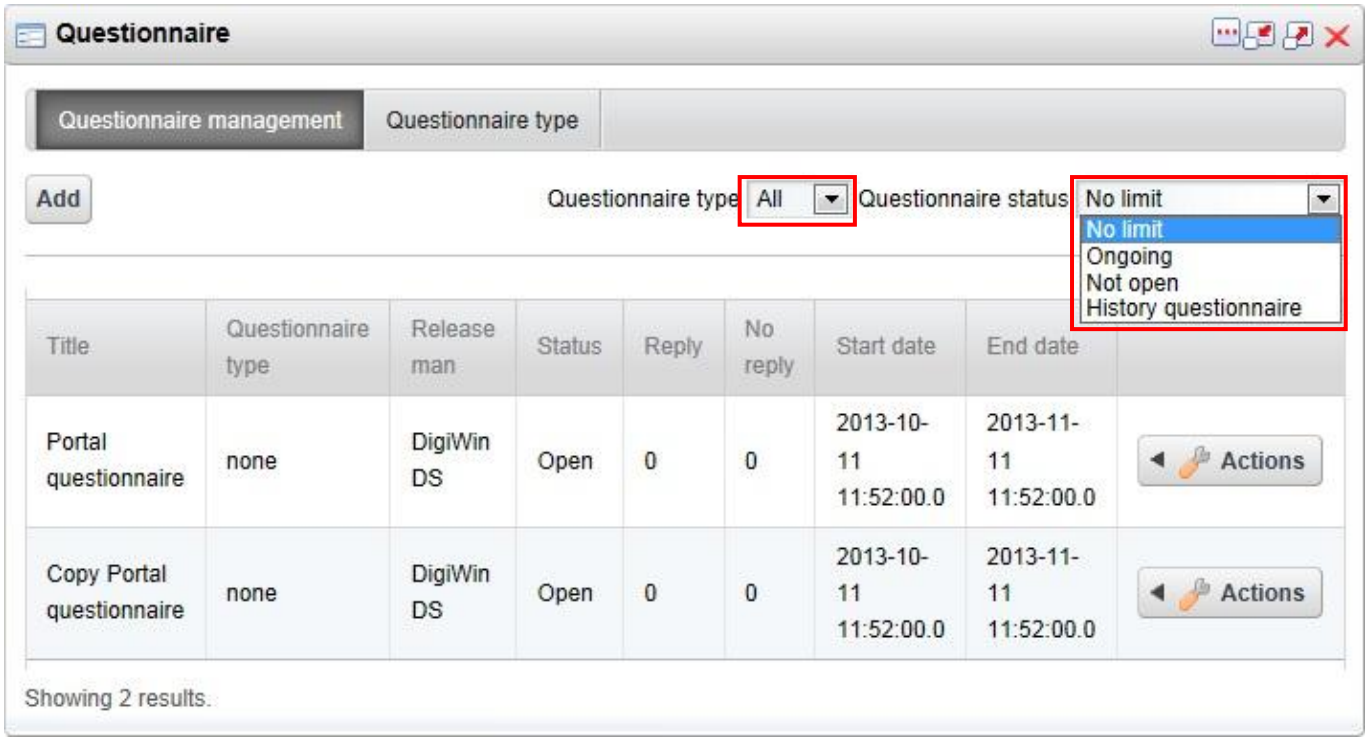


- The administrator can add, edit and delete a type



5.8.2 Questionnaire Display Setting

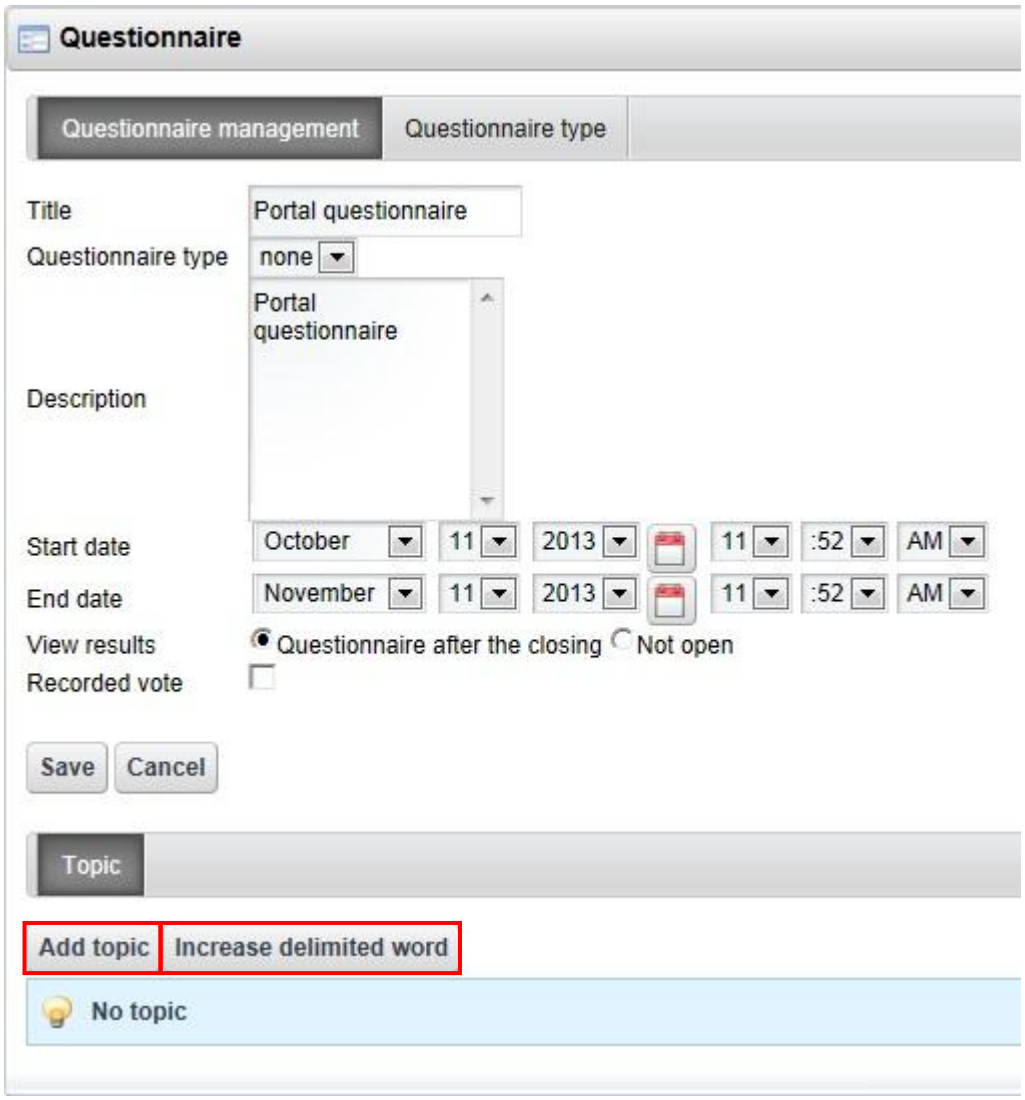
Two major questionnaire displays are “Questionnaire type” and “Questionnaire status”.



- Questionnaire type setting:
  - All: Display all types of and unclassified questionnaires
  - none: Display questionnaires which are not classified
- Questionnaire status:
  - No limit: Any status
  - Ongoing: Questionnaires which are ongoing and opened
  - Not open: Questionnaires which are closed
  - History questionnaire: Questionnaires whose end time is before the current time

5.8.3 Add Questionnaire

Edit new questionnaire, including text adjustment, addition and editing of question(s) and separation text.



- Title: Enter the title of the questionnaire (mandatory)
- Questionnaire type: Select questionnaire type
- Description: Description of questionnaire
- Start date: Start date of questionnaire, and the default is the current date
- End date: End date of the questionnaire, and the default is one month
- View results: Unopened or View after end date
- Recorded vote: Check it for non-anonymous questionnaire
- After saving, edit the questions of the questionnaire as follows:
  - Add topic: Add questionnaire question(s)
  - Increase delimited word: Separation text or character other than question

5.8.3.1 Topic and Delimited World

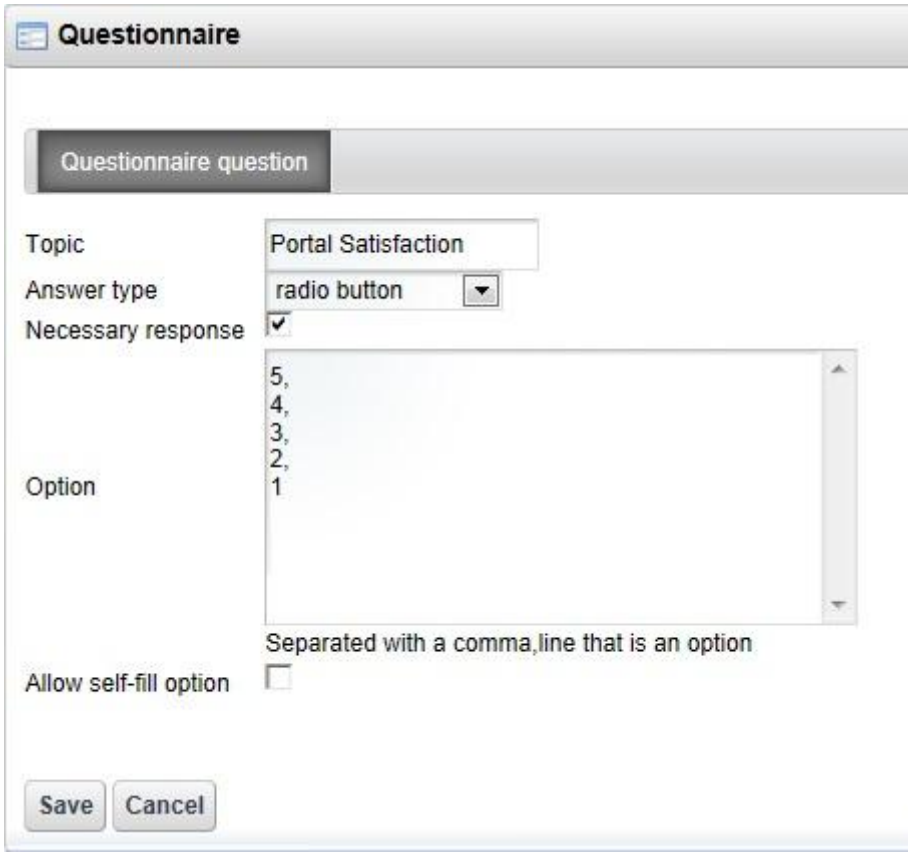
Topic and delimited world is managed in the following ways:

- Add topic and delimited world: Enter question or separation text of questionnaire to be added
- Edit: Modify the content of question or separation text
- Delete: Delete the content of question or separation text
- Questionnaire question copy: Copy the content of question or separation text

Tips The questionnaire questions cannot be managed at the time when the questionnaire is opened and is being filled in by a user. This restriction does not apply to separation text.

5.8.3.2 Add a Topic

Enter the content of the question to be added.

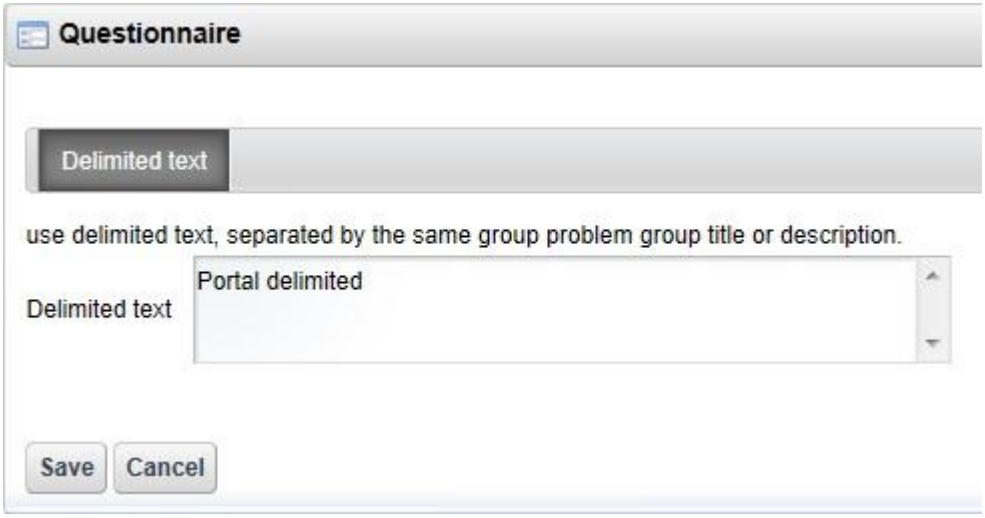


- Question: Mandatory field must not be left blank

- Answer type: Four types, namely “radio button”, “check box”, “drop down-menu” and “text input box”
- Necessary response: Check it for necessary reply
- Option: This item appears when radio button, checkbox or drop-down is selected, and all options are isolated by comma
- Allow self-fill option: “Other” options may be added at the end of question options, and any value may be entered

5.8.3.3 Add Delimited Word

Enter the content of delimited word to be added, which can be used to divide questionnaire question groups by title or description.



- Delimited text: The content must not be left blank

5.8.3.4 Questionnaire Question Copy

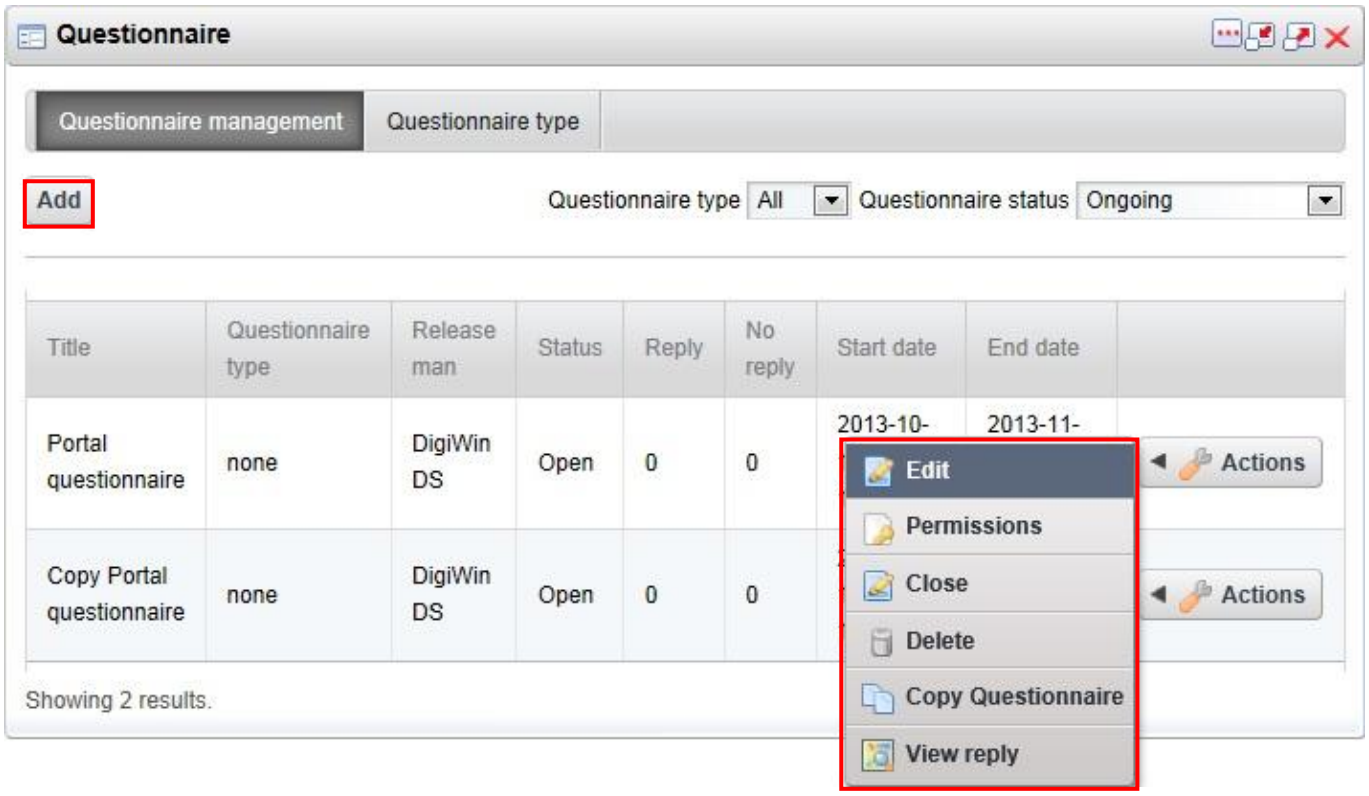
Click “Questionnaire question copy” to copy questions and all options, and Copy will appear before the question.

5.8.3.5 Adjust Question Sequence

Modify the sequence of the questions, and find their numbers in the drop-down menu, as shown below.

The following is a view after adjustment.

5.8.4 Edit Questionnaire Management



Add, edit, delete, permissions, open/close, copy questionnaire, or view reply for questionnaires

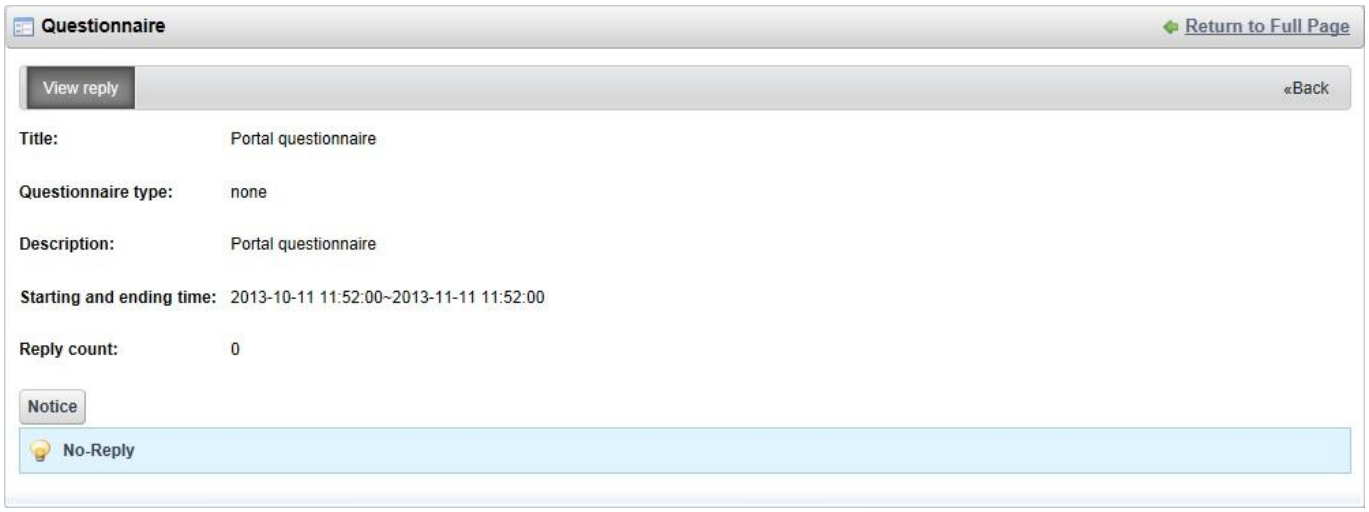
- Add/Edit/Delete: Add, edit or delete a questionnaire
- Open/Close: Change questionnaire status. Open a questionnaire to let ordinary users complete it
- Copy questionnaire: Copy the questionnaire's content, questions and options, and the word **Copy** will appear before the title of the questionnaire
- View reply: Administrator can view the content of the questionnaire that has been received

- Permissions: Click “Actions” on the right of data entry and then select “Permissions” to set the user permission to the questionnaire.

Permission setting:

Data entity	Questionnaire
Permitted to	Delete, Update, View, Permissions, Copy Questionnaire, Open/Close Questionnaire

5.8.5 View Reply (Questionnaire Management)



- Notice: Mail notification can be sent directly to personnel who have not completed the questionnaire
- View questionnaire statistics: Browse statistical result of response to the questionnaire
- Reply: Browse the reply result
- Delete: Delete a reply to let the user re-fill in the questionnaire

5.8.6 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissiona” to access the permission setting page.

Permission setting:

Data entity	Questionnaire management Portlet
Permitted to	Add to Page, ADD_QUESTIONNAIRE, View, Permissions, Configuration

5.9 Questionnaire Display

This feature enables ordinary users to complete and browse questionnaires. For general information, please refer to “DigiWin Portal Operating Instructions”.

5.9.1 Portlet Permission Setting

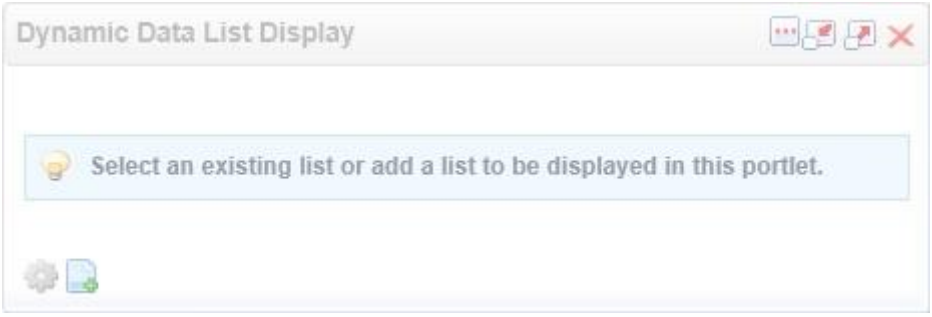
Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

Data entity	Questionnaire Display Portlet
Permitted to	Add to Page, View, Permissions, Configuration

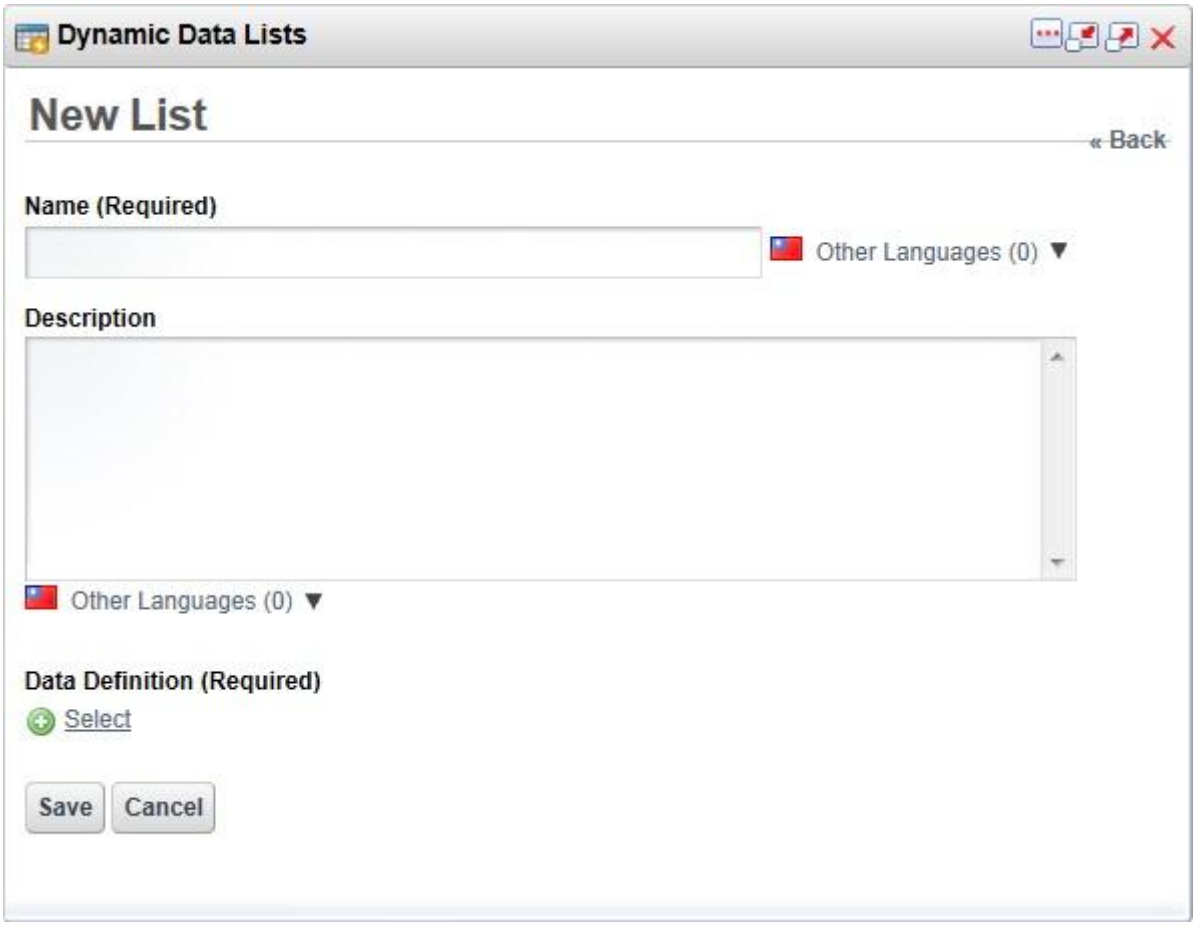
5.10 Dynamic Data List Display

This feature enables the user to define data template and facilitate data entry and view.



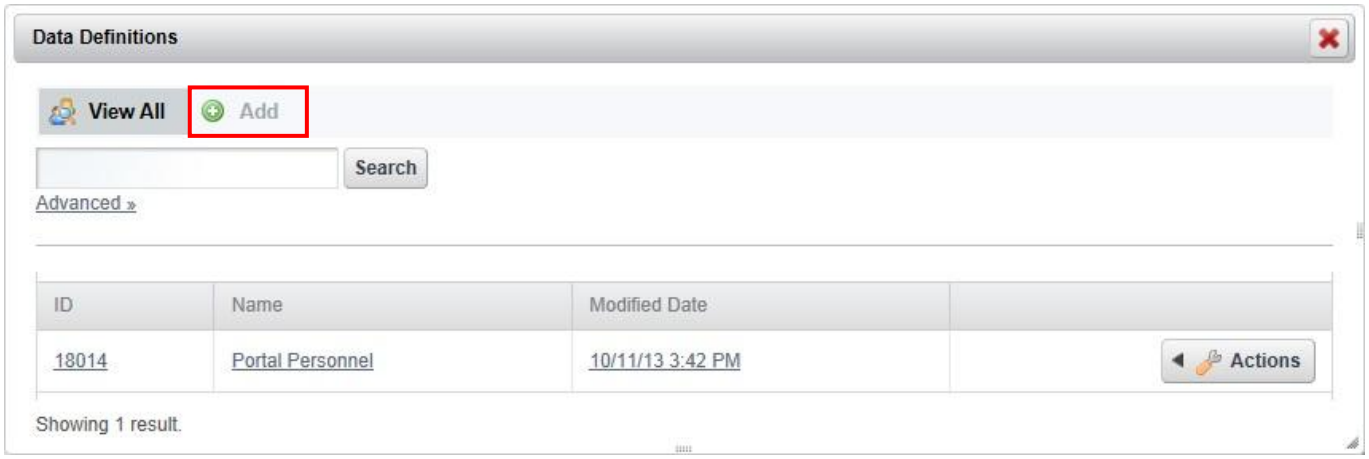
5.10.1 User-defined Data Template

Click “Add list” icon and the add list window will pop up. Enter name and description, and select the desired data definition to create a data template

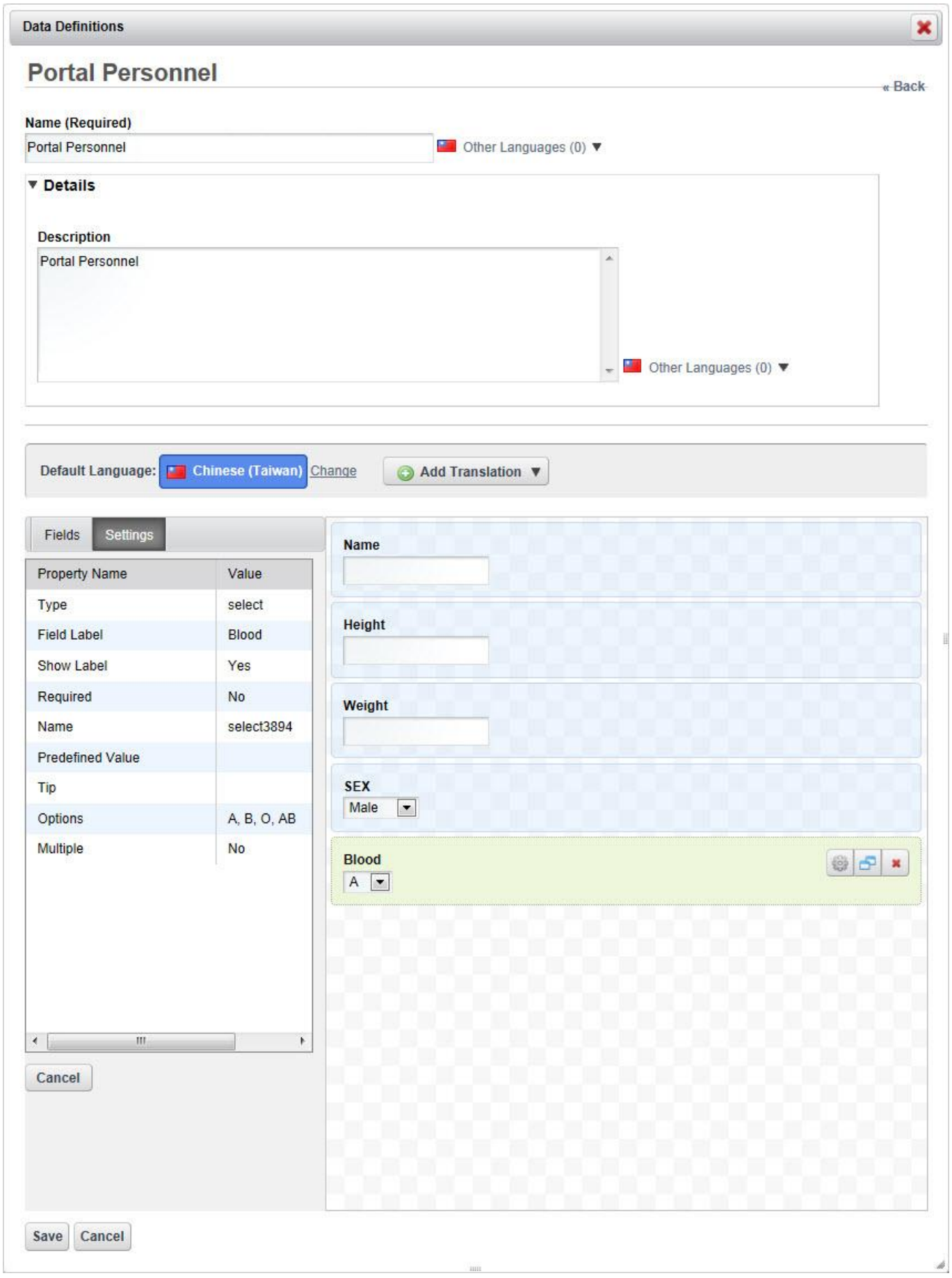


5.10.2 Add Data Definition

To add a data definition, press “Add” on the page of selecting data definitions to access the add data definition page.

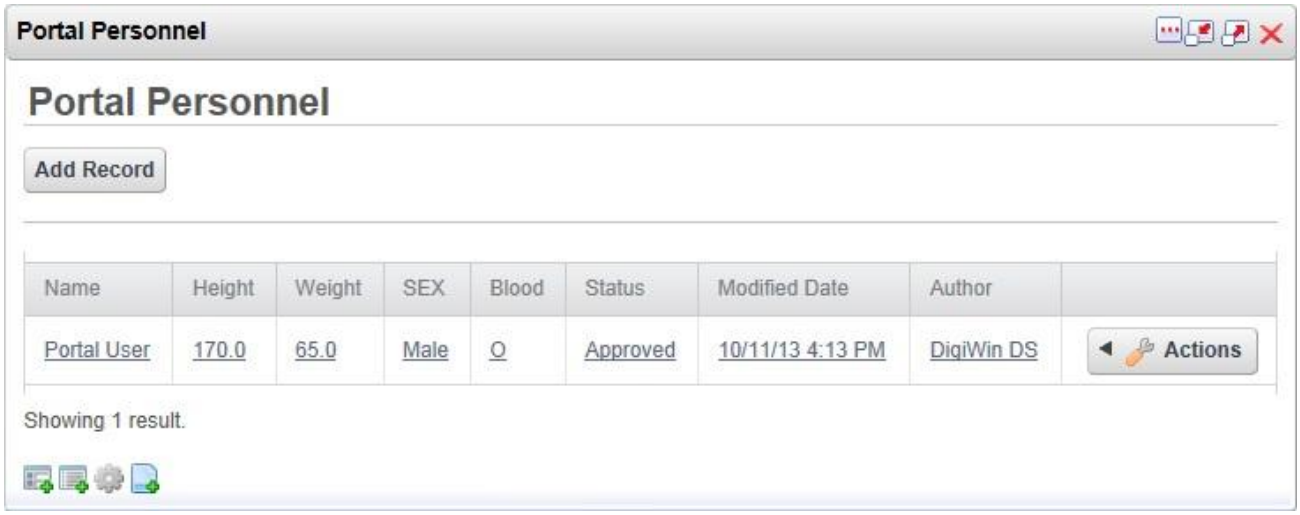


Enter name and description and arrange the data field in the interface below, and then press “Save” to add a new data definition.


Data Definitions
Portal Personnel
« Back
Name (Required)
Portal Personnel
Other Languages (0)
Details
Description
Portal Personnel
Other Languages (0)
Default Language: Chinese (Taiwan) Change
Add Translation
Fields
Settings
Property Name
Value
Type
select
Field Label
Blood
Show Label
Yes
Required
No
Name
select3894
Predefined Value
Tip
Options
A, B, O, AB
Multiple
No
Cancel
Name
Height
Weight
SEX
Male
Blood
A
Save
Cancel

5.10.3 Enter Data

After adding a data template, press “Add record” to add the data to the user-defined data template.



While accessing the page of adding data, the user can see the data definition field that the user has just created. After entry, press “Release” to add new data.

5.10.4 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

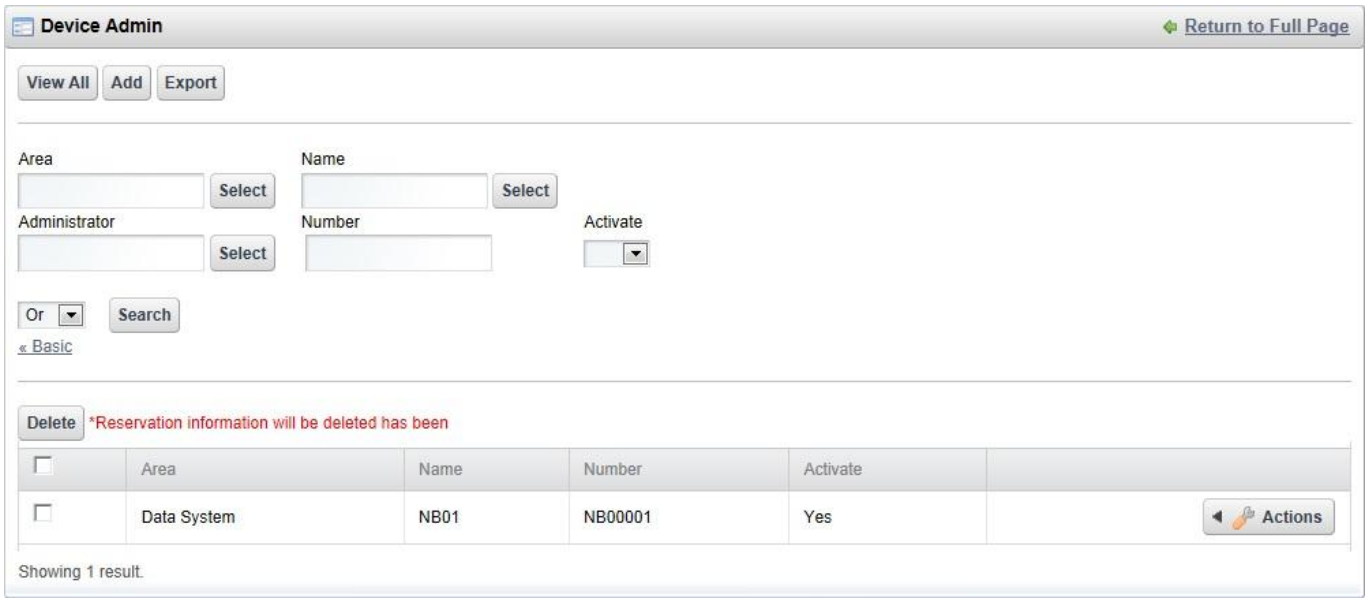
Permission setting:

Data entity	Dynamic data list display Portlet
Permitted to	Add to Page, View, Permissions, Configuration

6. Conference management

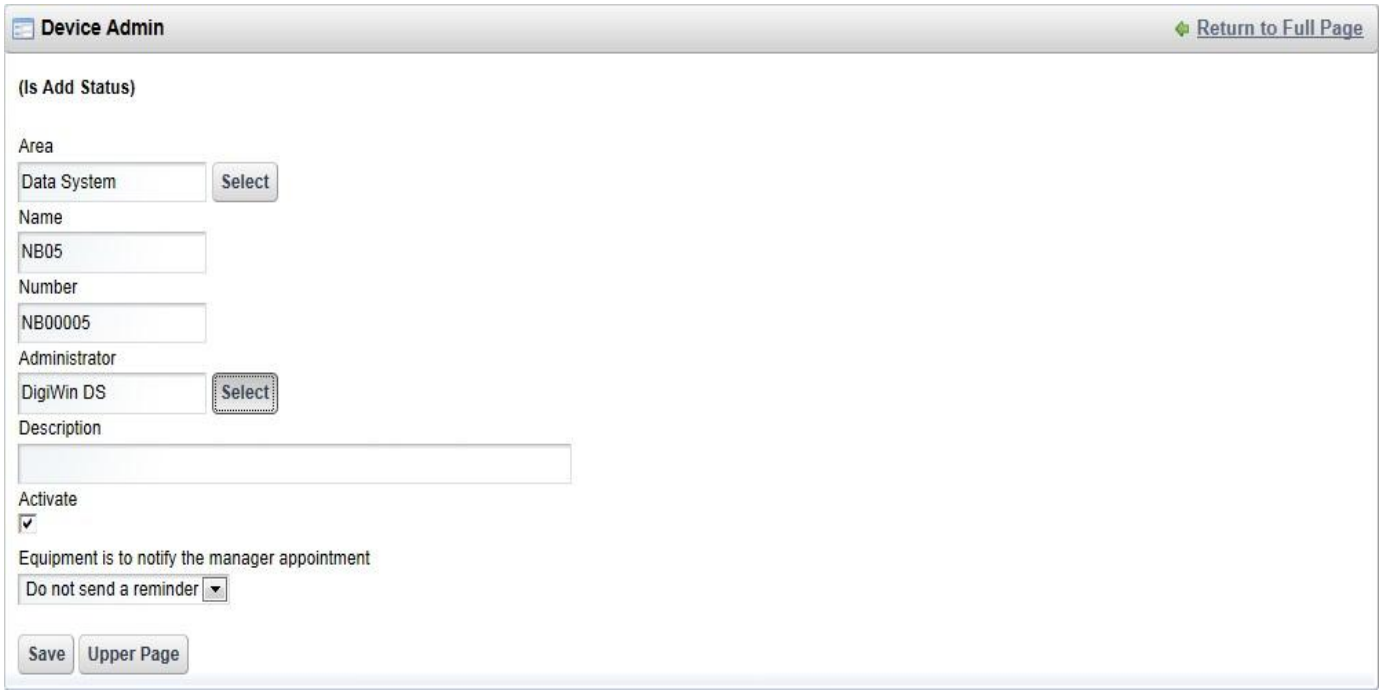
6.1 Device Resource Admin

This feature enables system administrator to control device resource data.



6.1.1 Add Device Resource

Initial page of equipment resource management is search mode. Press “Search” to display current equipment resource data, and then press “Add” to access the page of adding data. After entering related data, click “Save”.



- Area: Set the region to which the equipment resource belongs. Press “Select” on the right of the field to set the region (To edit the region, refer to “Control panel” “Portal basic setting” “Organization”)
- Name: Enter the name of equipment resource
- Number: Enter the No. of equipment resource
- Administrator: Select the administrator of the equipment resource. For this purpose, press “Select” on the right of the field
- Description: Enter the note of equipment resource
- Activate: Check it to have the equipment opened for reservation and use. Uncheck it to have the equipment suspended and not opened for reservation
- Equipment is to notify the manager appointment (Do not send a reminder /Email Address): Set whether the administrator (“Device administrator” in the foregoing setting) is notified when the equipment is reserved

6.1.2 Modify Device Resource

Click “Actions” on the right of data entry and then select “Edit” to access the modification page. For data editing method, please refer to “Add equipment resource”. After modification, click “Save”.

6.1.3 Delete Device Resource

Click “Actions” on the right of data entry and then select “Delete” to delete the data

6.1.4 Search Device Resource

Access search mode of equipment resource management, enter query conditions and then press “Search”. Results that meet the conditions will be listed below.

Search conditions available include:

- Area: Enter the region to which the equipment to be searched belongs. Press “Select” on the right of the field to set region condition
- Name: Enter the name or a keyword of the equipment resource to be searched
- Administrator: Enter the equipment administrator to be searched. Press “Select” on the right of the field to set administrator condition
- Number: Enter the number or a keyword of equipment resource to be searched
- Activate: Select activation status (Yes/No) of equipment resource to be searched

- Logic operation: Select logic operation method (And/Or) between search conditions. “And” means all conditions must be met while “Or” means at least one of all conditions must be met

6.1.5 Export Data

On the search view above, press “Export” to export search results of equipment resource as CSV file (openable in Excel).

6.1.6 Set Cyclic Reservation Period

Tips This function applies to system administrator only.

This feature enables the user to set the longest period of cyclic reservation of equipment resource. Press “Preferences” in the equipment resource management toolbar to access the setting page. Select “Longest reservation period” (One week/Two week/One month/Two month/Three months/Six months/One year) and then click “Save”.

6.1.7 Portlet Permission Setting

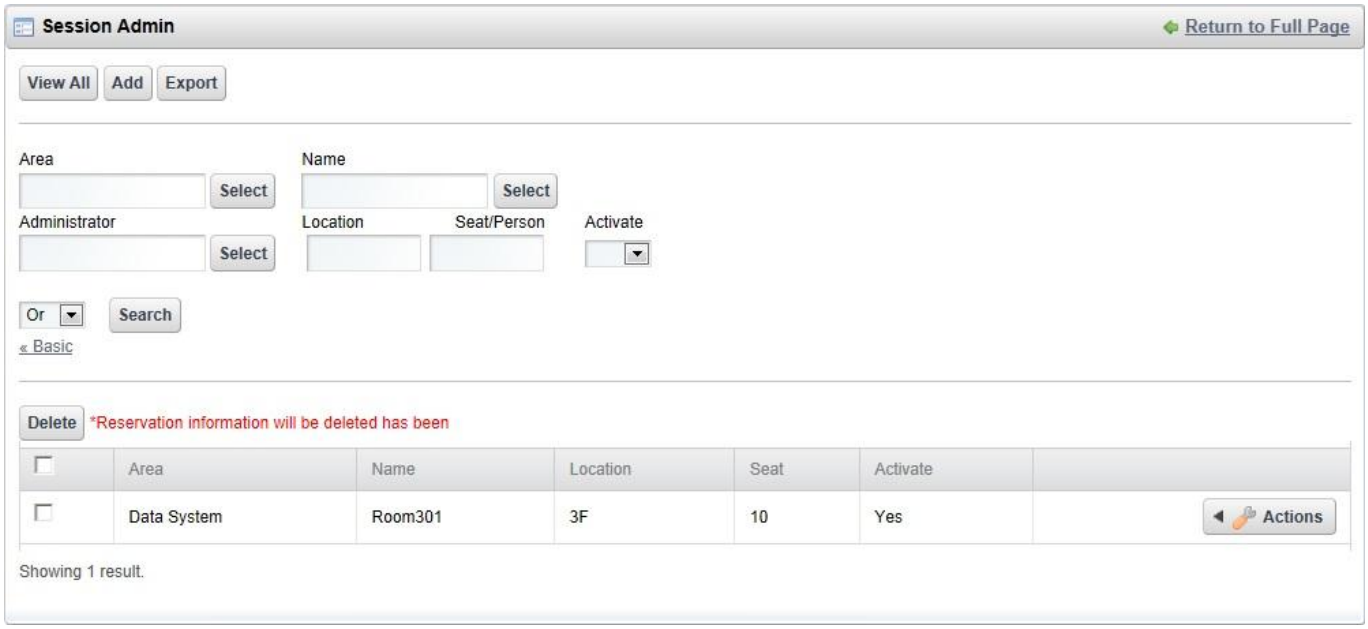
Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Device Admin Portlet
Permitted to	Add Device, Configuration, View, Do not apploy datamask, Preferences, Add to Page, Access in Control Panel, Permissions

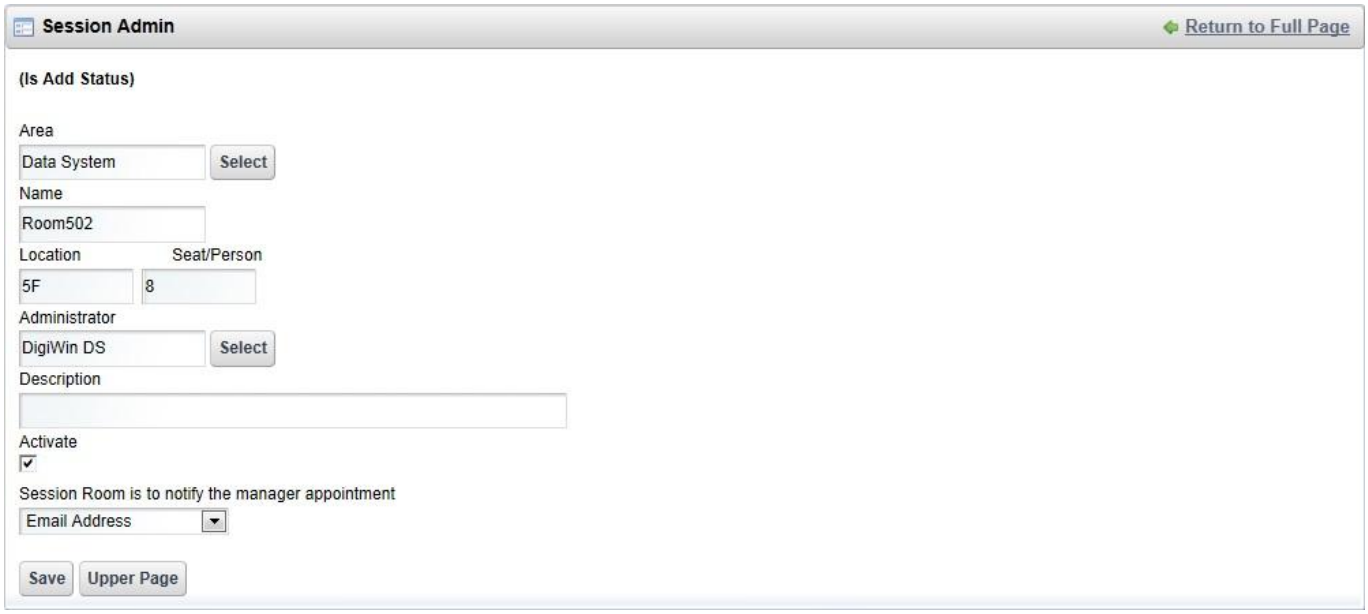
6.2 Session Admin

This feature enables system administrator to control session room data.



6.2.1 Add Session Room

Initial view of session admin is search mode. Press “Search” to display current conference room data and then click “Add” to access the page of adding data. After entering related data, click “Save”.



- Area: Select the region to which the conference room belongs. For this purpose, press “Select” on the right of the field
- Name: Enter the name of conference room
- Location: Enter the location of conference room, such as building, region, floor…
- Seat/Person: Enter the number of seats in or seating capacity of the conference room

- Administrator: Select the administrator of the conference room. For this purpose, press “Select” on the right of the field
- Description: Enter the note of the conference room
- Activate: Check it to have the conference room opened for reservation and use. Uncheck it to have the conference room suspended and not opened for reservation
- Session Room is to notify the manager appointment (Do not send a reminder /Email Address): Set whether the administrator (“Session room administrator” in the foregoing setting) is notified when the conference room is reserved

6.2.2 Modify Session Room

Click “Actions” on the right of data entry and then select “Edit” to access the modification page. For data editing method, please refer to “Add conference room”. After modification, click “Save”.

6.2.3 Delete Session Room

Click “Actions” on the right of data entry and then select “Delete” to delete the data.

6.2.4 Search Session Room

Access search mode of session room management, enter query conditions and then click “Search”. Results that meet the conditions will be listed below.

Search conditions available include:

- Area: Enter the region to which the conference room to be searched belongs. Press “Select” on the right of the field to set region condition
- Name: Enter the name and a keyword of conference room to be searched
- Administrator: Enter the administrator of conference room to be searched. Press “Select” on the right of the field to set administrator condition
- Location: Enter the location and a keyword of conference room to be searched
- Seat/Person: Enter the number of seats in or seating capacity of conference room to be searched
- Activate: Select activation status (Yes/No) of conference room to be searched
- Logic operation: Select logic operation method (And/Or) between search conditions. “And” means all conditions must be met while “Or” means at least one of all conditions must be met

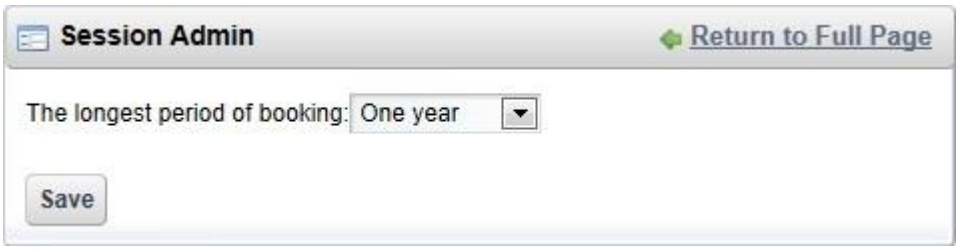
6.2.5 Export Data

On the search view above, press “Export” to export search results of conference room as CSV file (openable in Excel)

6.2.6 Set Cyclic Reservation Period

Tips This function applies to system administrator only.

This feature enables the user to set the longest period of cyclic reservation of conference room. Press “Preferences” in conference room management toolbar to access the setting page. Select “The longest period of booking” (One week/Two week/One month/Two month/Three month/Six month/One year) and then click “Save”.



6.2.7 Portlet Permission Setting

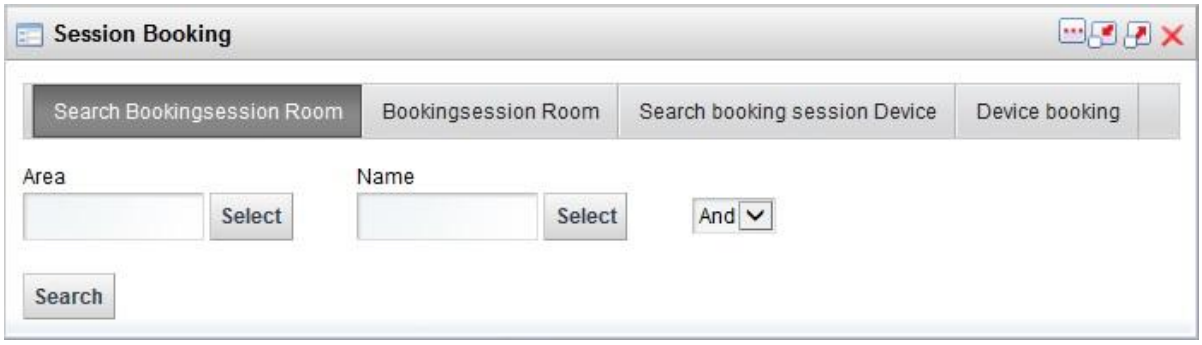
Click “Setting” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

Data entity	Session Admin Portlet
Permitted to	Add Session Room, Configuration, View, Do not apploy datamask, Preferences, Add to Page, Access in Control Panel, Permissions

6.3 Session Booking

This feature enables the user to query and reserve session room and device resources.

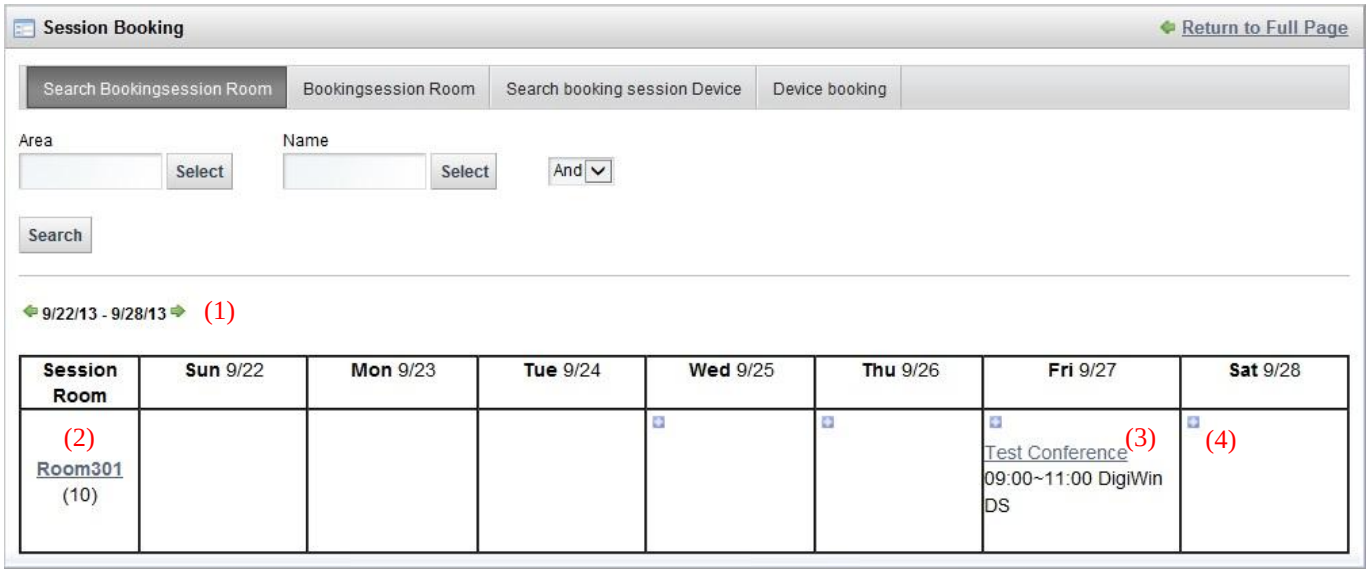


6.3.1 Search Bookingsession Room

Click “Search Bookingsession Room” tab, enter query conditions and then click “Search”. Results that meet the conditions will be listed below.

Search conditions available include:

- Area: Enter the region to which the conference room to be searched belongs. Press “Select” on the right of the field to set region condition
- Name: Enter the name and a keyword of conference room to be searched
- Logic operation: Select logic operation method (And/Or) between search conditions. “And” means all conditions must be met while “Or” means at least one of all conditions must be met.



Query results display conference room reservation status in current week by default, which is described below according to the numbers shown above:

(1) Date switchover button: Press ◄ or ► to switch and search date range, whose unit is “One week”

(2) Session room information link: Click and view details of the conference room

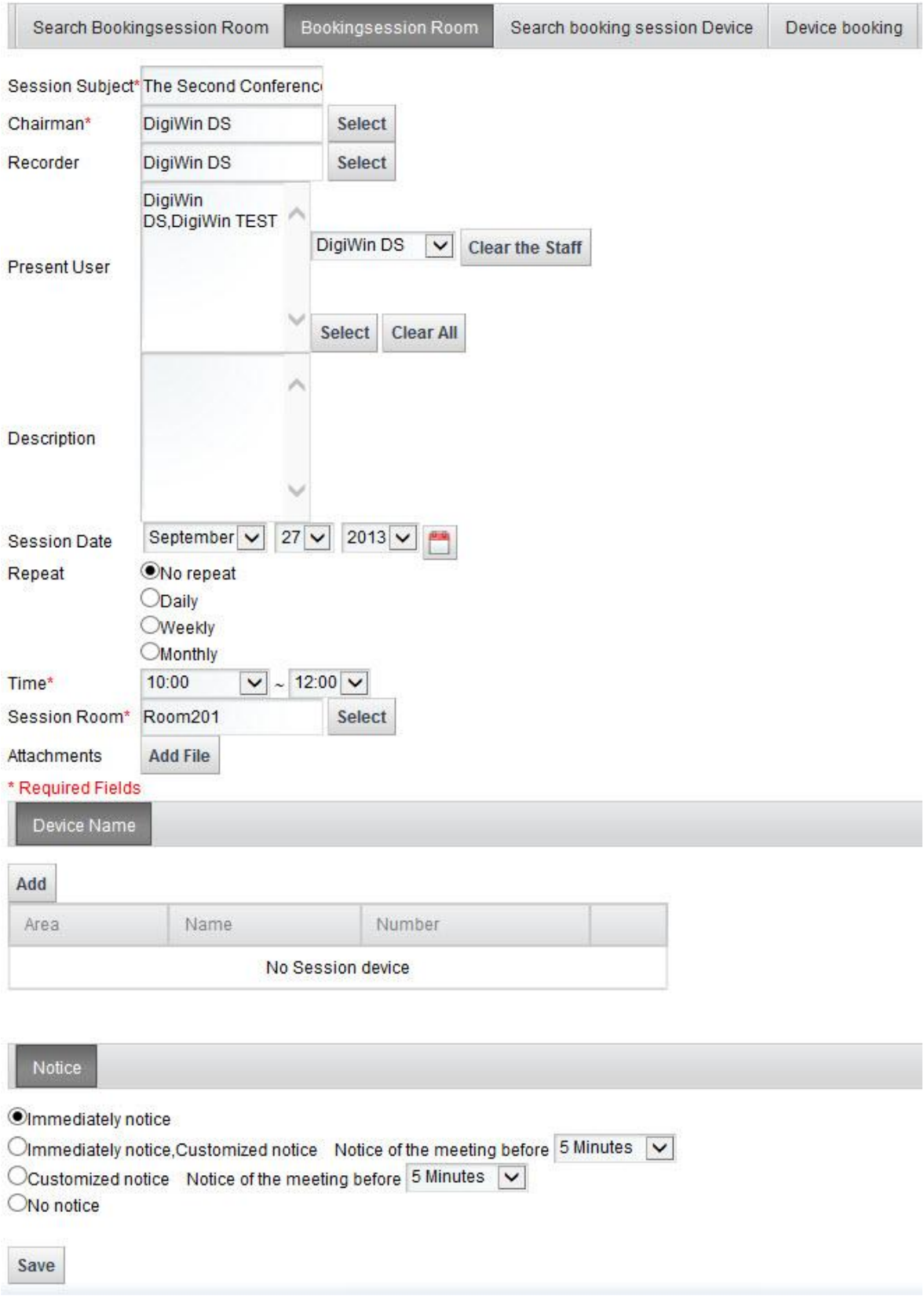
(3) Session topic link: Click and view the conference’s reservation details or access the edit mode

(4) Conference room booking link: Press ▫ to reserve conference room for current date. For operation method, please refer to “Reserve conference room”

6.3.2 Booking Session Room

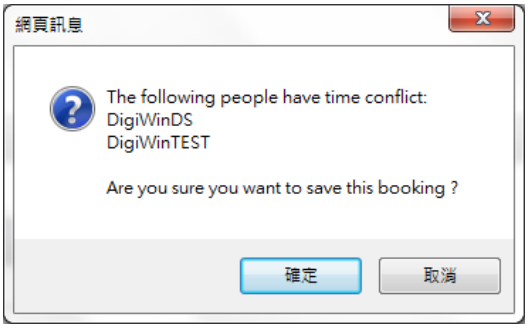
6.3.2.1 Add Session Booking

Click “Booking Session Room” tab to access the view of adding reservation. After entering related data, click “Save”.



- Session Subject: Enter the topic of the conference
- Chairman: Select the president of the conference. For this purpose, press “Select” on the right of the field
- Recorder: Select the recorder of the conference. For this purpose, press “Select” on the right of the field
- Present User: Select attendees. Press “Select” on the right of the field to select attendees. To remove a particular person, select the person from the list on the right and press “Clear the Staff”. To remove all personnel, please click “Clear All”
- Description: Enter conference outline
- Session Date: Set conference date. Press to select a date in the calendar mode
- Repeat: Determine whether it is a single conference reservation (no repetition), or cyclic conference reservation (cycle including daily/weekly/monthly can be set)
- Time: Set start and end time of the conference
- Session Room: Select conference room. For this purpose, press “Select” on the right of the field
- Attachments: Press “Add File” to upload conference-related attachment(s). For cyclic reservation, after finishing the conference reservation, open the conference reservation data of attachment to be uploaded (while opening the data, please select “Edit the reservation”) to upload the attachment
- Device Name: Select equipment resource to be reserved for the conference. Press “Add” to select the equipment resource
- Notice: Set conference reminder (immediate reminder/reminder before start of conference/no reminder)

Tips While making a single reservation, if some attendees have other appointments within the same time period, the system will present a list of such personnel.
To go on the reservation, click “OK”. To give up the reservation, click “Cancel” to return to the original view to adjust time period before making the reservation.



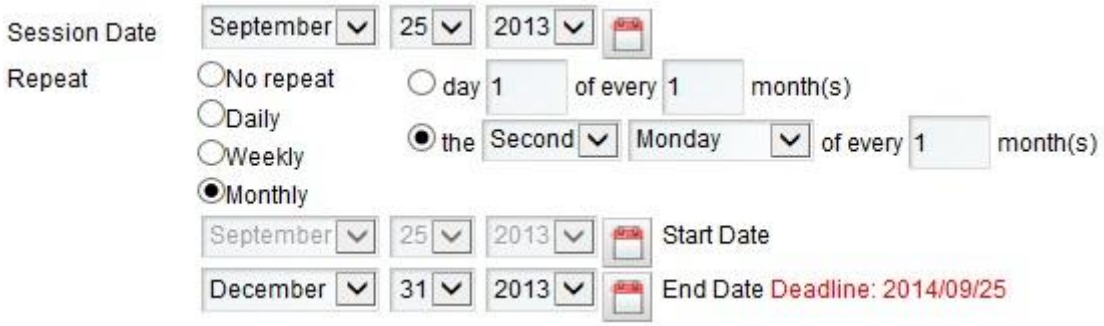
6.3.2.2 Cyclic Session Booking

This feature enables the user to reserve cyclic conferences.

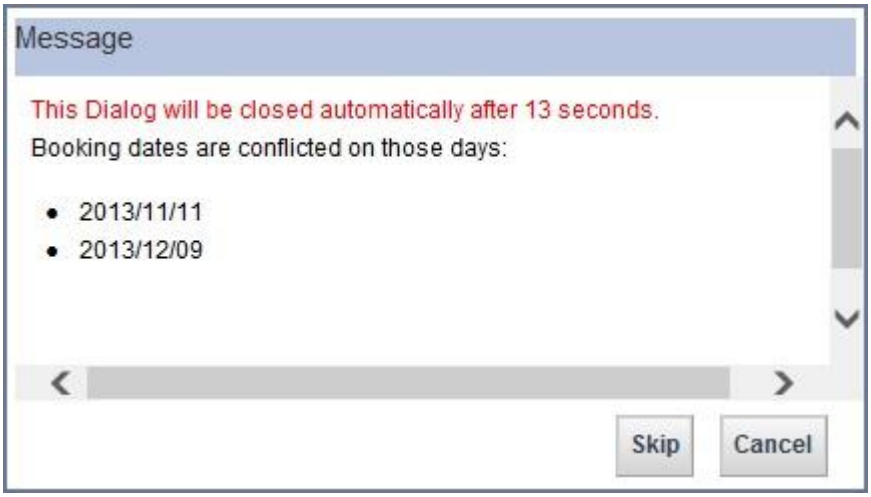
- Repeated cycles available: Daily/weekly/monthly
- Start Date, End Date: Start date and end date of repeated cycle

Tips If the system has set the longest period of conference cycle reservation (Please refer to the section of “Set cyclic reservation period” in “Conference room management”), the reservation range must not exceed the period of end date; however, this restriction does not apply to system administrator and conference room administrator (only for conference room under his/her responsibility).

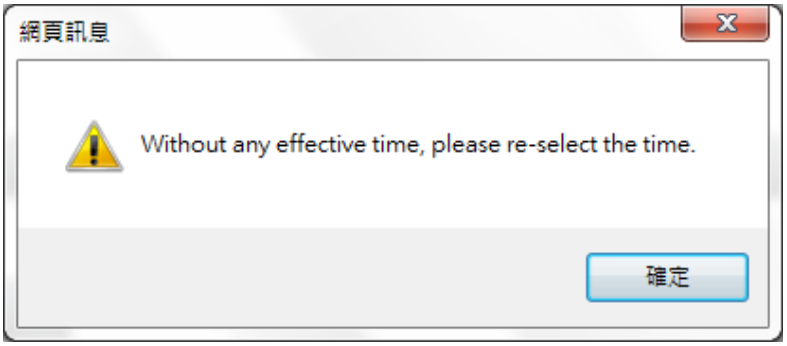
Take the following as an example. Set “Second Monday of each month” at repeated reservation of the same conference until 31/12/2013.



If the conference room is already reserved within some of the set time, the system will present conflicting dates.
Click “Skip” to give up the reservation for any conflicting part and make the reservation for other non-conflicting part;
Click “Cancel” to return to the original view and adjust time period before making the reservation.



If all set time is already reserved, the system will present a prompt message saying “Without any effective time, please re-select the time”.

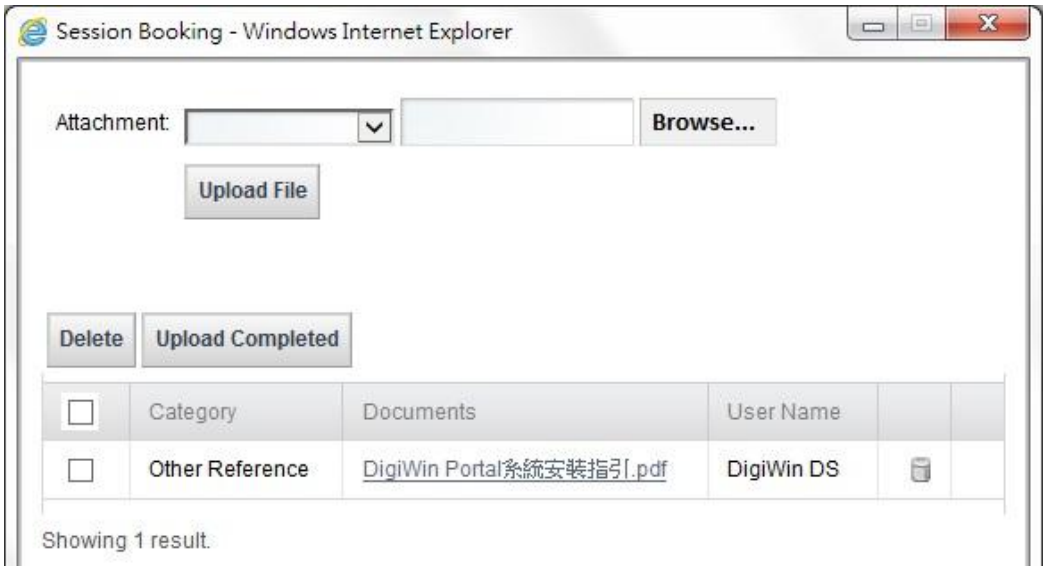


6.3.2.3 Upload Session-related Attachment

This feature enables the user to upload session-related attachments so that attendees will download and view those attachments beforehand.

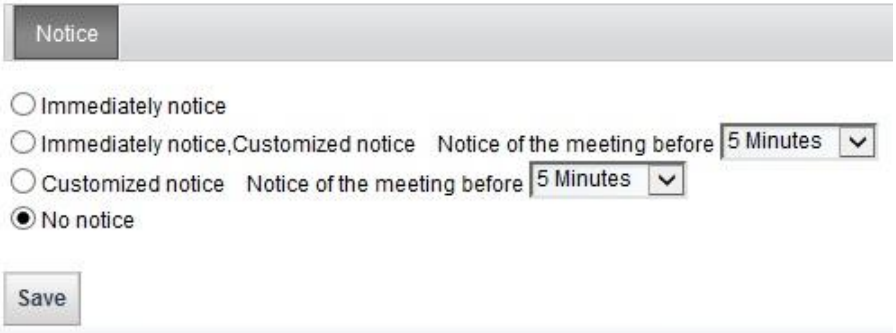
- To upload an attachment, select “Attachment type” (conference outline/other reference/conference minutes)
- Press “Browse…” to select the file to be uploaded and then click “Upload File”. After uploading, click “Upload Completed”
- To remove an uploaded file, check that file and click “Delete”

Tips Persons other than attendees cannot download attachments.



6.3.2.4 Session Notice

After finishing and saving the conference reservation, the system will automatically send the conference notification to personal calendar of required attendees so that they can make a schedule in advance. In addition to automatic inclusion in calendar, the system may also send E-mail notification by the setting of “Conference reminder”.



Reminder options:

- Immediately notice: Send E-mail notification immediately after a successful conference reservation (This function does not apply to cyclic reservation)
- Immediately notice, Customized notice: Set the advance time of E-mail notification before the conference
- Customized notice: Set the advance time of E-mail notification before the conference
- No notice: Close the conference’s reminder function

6.3.2.5 Edit Session Booking

On “Search Bookingsession Room” page search out the session booking data to be edited. Click “Session topic” to access edit page. After modifying data, click “Save”.

Tips If conference reservation data to be edited are “Cyclic” reservation, the above window will pop up before the user accesses the edit view.
(1) This booking: It means only current reservation data, excluding other data in the same series, will be modified, and that current reservation data will be irrelevant to the reservation series (Any modification or deletion of the original cyclic reservation series will not apply to the current reservation data).
(2) Period booking: Modify all data of the entire reservation series.

6.3.2.6 Delete Session Booking

On “Search Bookingsession Room” page search out the conference reservation data to be deleted. Click “Session topic” to access edit page. Click “Delete” to delete the conference reservation data. Permission to delete: Reserving personnel can delete session booking data created by themselves; session room administrator can delete session booking data of the reserved session room; system administrator can delete any conference reservation data.

Tips If the conference reservation data to be deleted are “Cyclic” reservation, the system will ask “Edit current reservation or cyclic reservation” before the user accesses the edit view.
(1) Current reservation: It means only current reservation data, excluding other data in the same series, will be deleted.
(2) Cyclic reservation: It means the data of the reservation system will be modified. Before deletion, the system will ask for deletion option:
Option 1: Delete currently selected conference reservation data only.
Option 2: Delete currently selected conference reservation data and reservation data in the same series whose date is later.
Option 3: Delete the data of the entire reservation series.

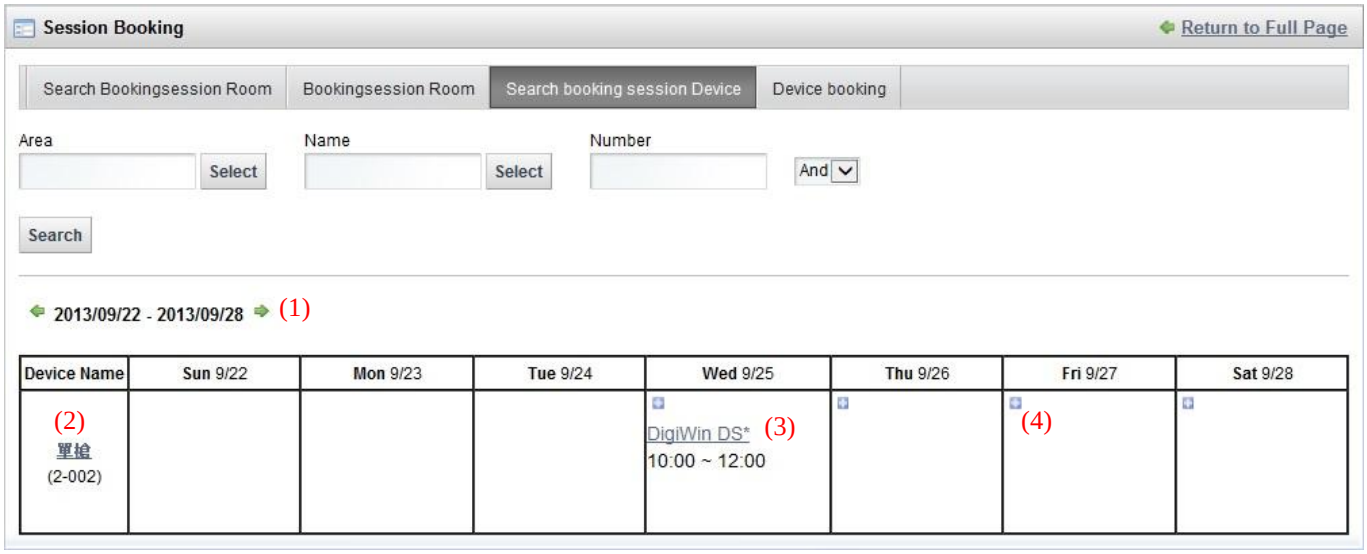
Message
Delete the booking meetings ?
Option 1: Delete this booking only (Date: 2013/11/04)
Option 2: Delete this (Date: 2013/11/04) and after bookings
Option 3: Delete this period bookings
Option one
Option two
Option three
Cancel

6.3.3 Search Booking Session Device

Click “Search booking session Device” tab, enter query conditions and then click “Search”. Results that meet the conditions will be listed below.

Search conditions available include:

- Area: Enter the area to which the device resource to be searched belongs. Press “Select” on the right of the field to set region condition
- Name: Enter the name or a keyword of the device resource to be searched
- Number: Enter the number or a keyword of device resource to be searched
- Logic operation: Select logic operation method (And/Or) between search conditions. “And” means all conditions must be met while “Or” means at least one of all conditions must be met.



Query results display equipment resource reservation status in current week by default, which is described below according to the numbers shown above:

(1) Date switchover button: Press ◄ or ► to switch and search date range, whose unit is “One week”

(2) Device resource information link: Click it to view the details of the equipment resource

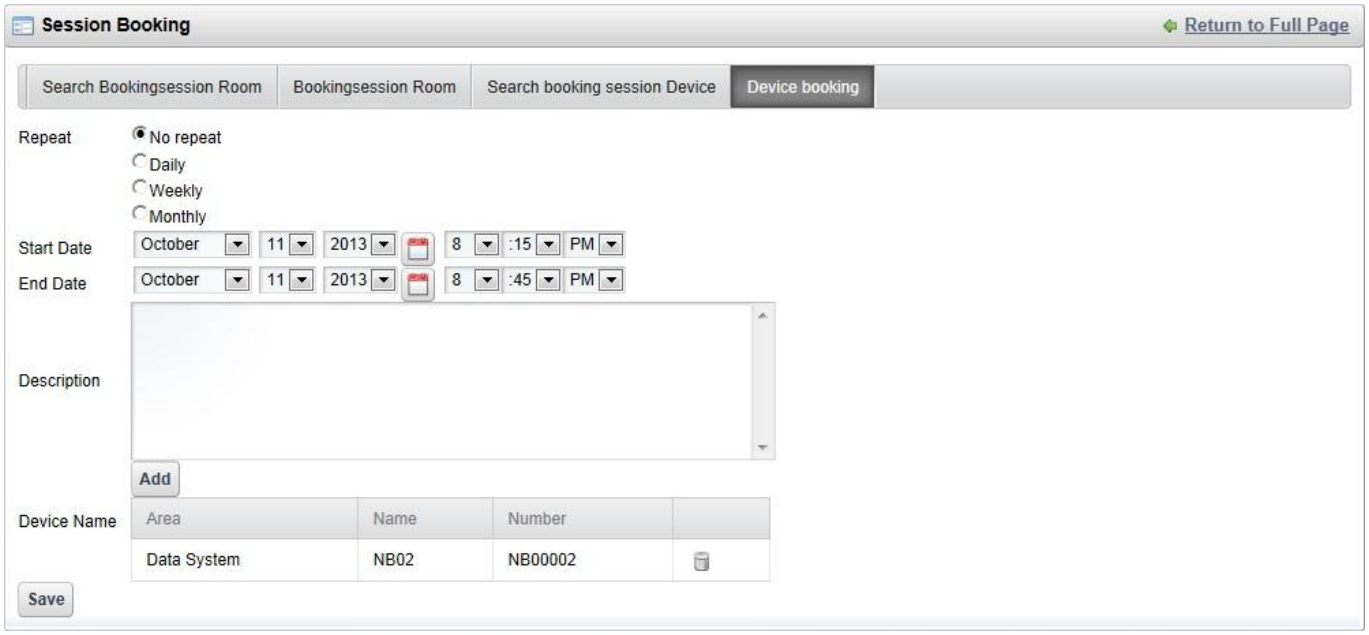
(3) Reserving personnel link: Click it to view the reservation details of the equipment resource

(4) Device resource booking link: Press ⊞ to reserve equipment resource on current date. For operating method, please refer to “Reserve equipment resource”

6.3.4 Booking Device Resource

6.3.4.1 Add Device Booking

Click “Device booking” tab to access the view of adding reservation. After entering related data, click “Save”.



- Repeat: Determine whether it is a single equipment reservation (no repetition), or cyclic equipment reservation (cycle including daily/weekly/monthly can be set)
- Start /end time of reservation date: Set the start and end time of the reservation. Press to select a date in the calendar mode
- Description: Enter reservation notes
- Device Name: Select the device resource to be reserved. Press "Add" to select the required device and press to delete the reserved equipment

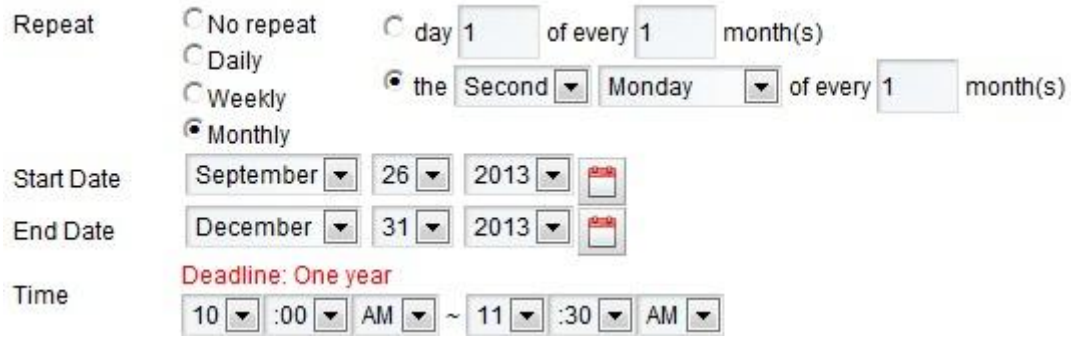
6.3.4.2 Cyclic Device Booking

This feature enables the user to make cyclic reservation of equipment.

- Repeated cycles available: Daily/weekly/monthly
- Start date, end date: Start date and end date of repeated cycle

Tips If the system has set the longest period of cyclic equipment reservation (Please refer to the section of "Set cyclic reservation period" in "Device Resource Admin"), the reservation range must not exceed the period of end date; however, this restriction does not apply to system administrator and equipment administrator (only for equipment under his/her responsibility).

Take the following as an example. Set "Second Monday of each month" at repeated reservation of the same equipment until 31/12/2013.



If the equipment is already reserved within some of the set time, the system will present conflicting dates.
Click “Skip” to give up the reservation for any conflicting part and make the reservation for other non-conflicting part;
Click “Cancel” to return to the original view and adjust time period before making the reservation.

If all set time is already reserved, the system will present a prompt message saying “Equipment resource… is already reserved. Please enter a new period”.

Your request failed to complete.
Search Bookingsession Room
Bookingsession Room
Search booking session Device
Device booking
Equipment resource (0) has been reservations, please re-enter.

6.3.4.3 Edit Device Booking

On “Search Booking Session Device” page, search out equipment reservation data to be edited. Click the name of reserving person to access the edit page. After modifying data, click “Save”.

If the equipment reservation data to be edited are “Cyclic” reservation, the system will ask “Edit current reservation or cyclic reservation” before the user accesses the edit view.
(1) This booking: It means only current reservation data, excluding other data in the same series, will be modified, and that current reservation data will be irrelevant to the reservation series (Any modification or deletion of the original cyclic reservation series will not apply to the current reservation data).
(2) Period booking: Modify all data of the entire reservation series.

6.3.4.4 Delete Device Booking

On “Search Booking Session Device” page, search out equipment reservation data to be deleted. Click the name of reserving person to access the edit page. Click “Delete” to delete the session booking data. Permission to delete: Reserving personnel can delete session booking data created by themselves; device administrator can delete device booking data of the reserved equipment; system administrator can delete any device booking data.

Message
Remove the equipment reservation ?
Option 1: Delete this booking only (Date: 2013/09/26)
Option 2: Delete this (Date: 2013/09/26) and after bookings
Option 3: Delete this period bookings
Option one
Option two
Option three
Cancel

Tips If the equipment reservation data to be edited are “Cyclic” reservation, the system will ask “Edit current reservation or cyclic reservation” before the user accesses the edit view.
(1) This booking: It means only current reservation data, excluding other data in the same series, will be deleted.
(2) Period booking: It means the data of the reservation system will be modified. Before deletion, the system will ask for deletion option:
Option 1: Delete currently selected equipment reservation data only.
Option 2: Delete currently selected equipment reservation data and reservation data in the same series whose date is later.
Option 3: Delete the data of the entire reservation series.

6.3.5 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

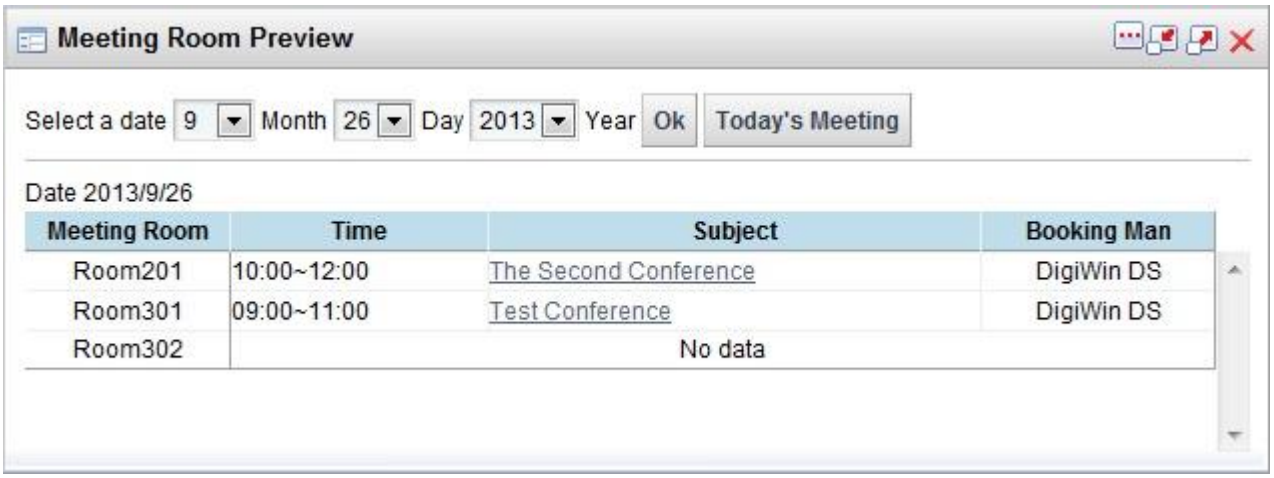
Permission setting:

Data entity	Conference resource reservation Portlet
Permitted to	Configuration, View, Do not apploy datamask, Preferences, Add to Page, Permissions

6.4 Meeting Room Preview

This feature enables the user to quickly view conference room reservation status for a particular date.

6.4.1 View Meeting Room Booking Status



- Select a date: The default displays conference room reservation status on current date. Select another date and press “OK” to query other reservation
- Today’s Meeting: Press “Today’s Meeting” to quickly switch to conference room reservation status on current date

Tips Click “Session Subject” link to open the data of the conference reservation and quickly edit or view details.
※This link will appear only if “Session Booking” Portlet is available on the current community page.
(The current community page means the page on the current tab)

6.4.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissiona” to access the permission setting page.

Permission setting:

Data entity	Conference room preview Portlet
Permitted to	View, Add to Page, Configuration, Permissions

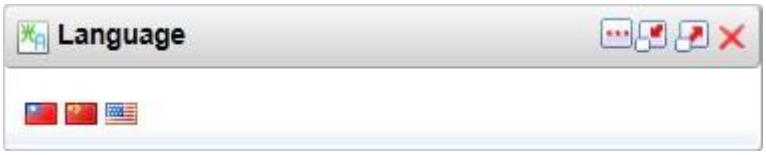
7. System Management

All functions in this section are for use only by a system administrator.

7.1 Language

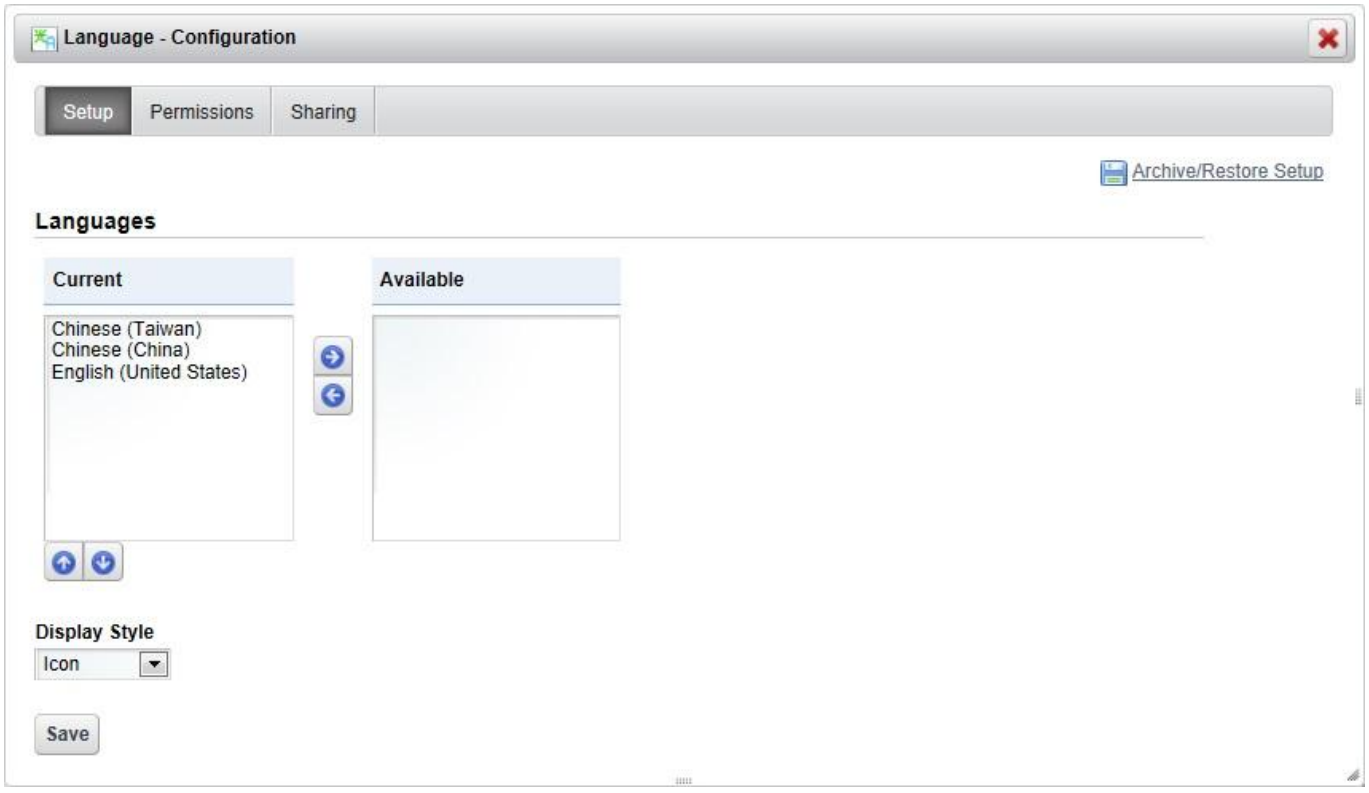
7.1.1 Select Language

Click the name of a language to switch system interface to that language. Languages currently available include: Traditional Chinese(), Simplified Chinese() and English().



7.1.2 Display Setting

Press “Configuration” in language toolbar to access the language’s display setting page.



7.1.2.1 Language Option

Set the applicable language option. Select the applicable language from “Available” list, add it to “Current” list and then click “Save”.

7.1.2.2 Display Style

Set the language's display pattern. Select "Display Style" and then click "Save".

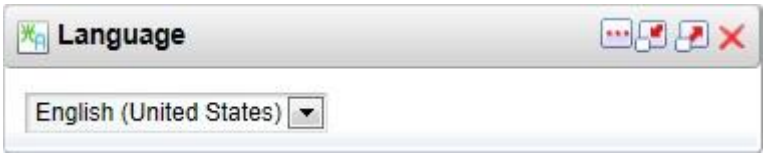
The following four display patterns are available:

- Diagram

- Long Text

- Short Text

- Select Box



7.1.3 Portlet Permission Setting

Click "Configuration" in the Portlet toolbar and then select the "Permissions" to access the permission setting page.

Permission setting:

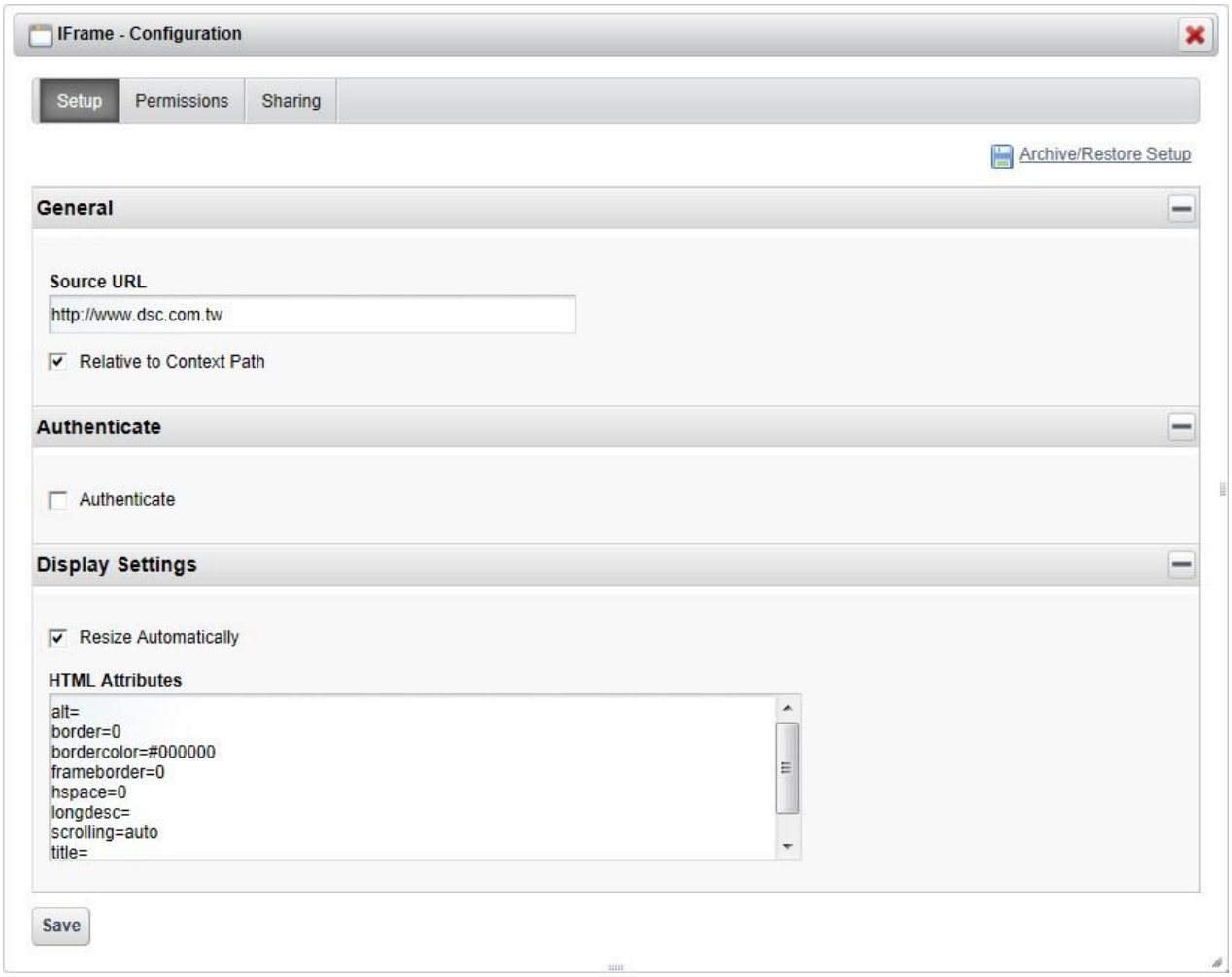
Data entity	Language Portlet
Permitted to	Add to Page, View, Permissions, Configuration

7.2 IFrame

This feature enables the user to designate URL to embed other webpages into Portal page.

7.2.1 Set IFrame

Press “Configuration” in IFrame toolbar to access the setting page. After entering related data, click “Save”.



- Source URL: Enter webpage URL to be embedded
- Relative to Context Path: Check and mark the entered URL as relative path
- Authenticate: Checking it for the link to the webpage which needs to be certified. It is necessary to set credential type(Basic/Form), user name, password, among other information.
- HTML Attributes: Set IFrame’s display pattern, such as: frame size, background color…
  The following attributes are available for setting:
  - border: Border width
  - bordercolor: Color of border
  - frameborder: Width of frame border
  - height-maximized: Maximum height of frame
  - height-normal: Normal height of frame
  - hspace: Horizontal left and right margin
  - scrolling: Whether scrolling exists
  - vspace: Vertical top and bottom margin
  - width: Frame width

After setting, return to the page view to view embeded webpage as follows.

7.2.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	IFrame Portlet
Permitted to	Add to Page, View, Permissions, Configuration

7.3 Launcher

This feature offers links to main page of DigiWin's integrated products.

7.3.1 Open Main Page of Products

Move the cursor to the product wording or icon to be linked. Left click to open the main page of the product.

7.3.2 Add Link

Press "Preferences" in the links toolbar to access the setting page. Click "Add". Access the page of adding links. After entering related data, click "Save".

- Title: Title of a link
- Link address: Type and address of the link (Please refer to the section of “Add menu” in “Common menu”)
- Icon: Icon of the link. Click “Browse” to select a picture file

7.3.3 Modify Link

Press “Preferences” in links toolbar to access the setting page. Select the link to be edited and click “Edit” to access the page of modifying links. After modifying related data, click “Save”.

7.3.4 Delete Link

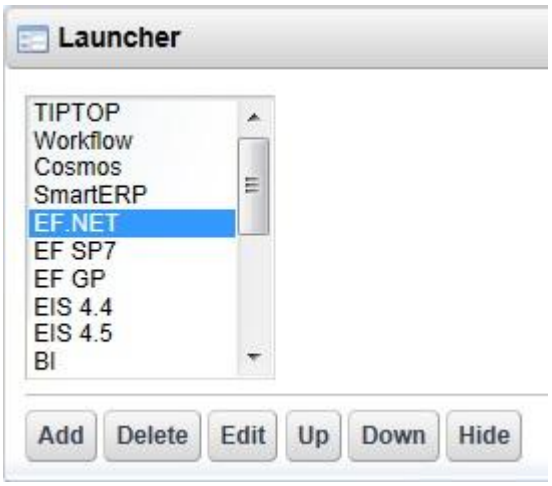
Press “Preferences” in links toolbar to access the setting page. Select the link to be deleted and click “Delete” to access the page of deleting links.

7.3.5 Hide Link

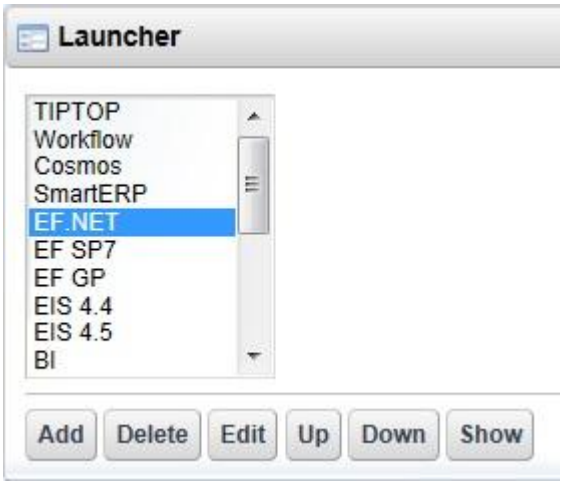
If a link is temporarily not open for use, it can be set as hidden.

Press “Preferences” in links toolbar to access the setting page. Select the link to be hidden and then click “Hide”. The link page will not display the link.

Tips Hidden items will be in gray text.



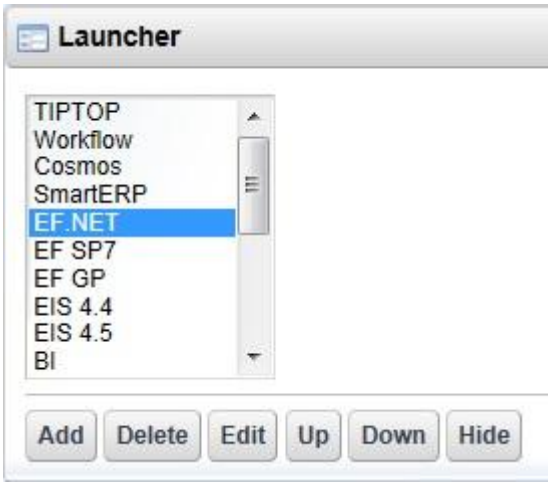
To restore a hidden item, please access the setting page, select the link to be restored, and then click "Display".



7.3.6 Adjust Display Sequence of Links

This feature enables the administrator to adjust display sequence of links.

Press "Preferences" in links toolbar to access the setting page, select the link to be moved, and press "Up" or "Down" to move the item to the designated position.



7.3.7 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Launcher Portlet
Permitted to	Preferences, Add to Page, View, Permissions, Configuration

7.4 User Menu

This feature provides a program list that enables the user to link to all integrated system tasks.

7.4.1 Open Link

Select the name of program list in “Role” and the tree menu below will immediately switch. Expand the tree menu and click an item to start the corresponding task or program.

If the system to be linked is a “Multi-company-type” structure (e.g. ERP, CRM), please select “Company” of the system to be logged in on the top right corner of the Portal system and then click the link to program list.

7.4.2 Edit User Menu

To edit a program list, please use “Portal MenuDesigner” tool.

7.4.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

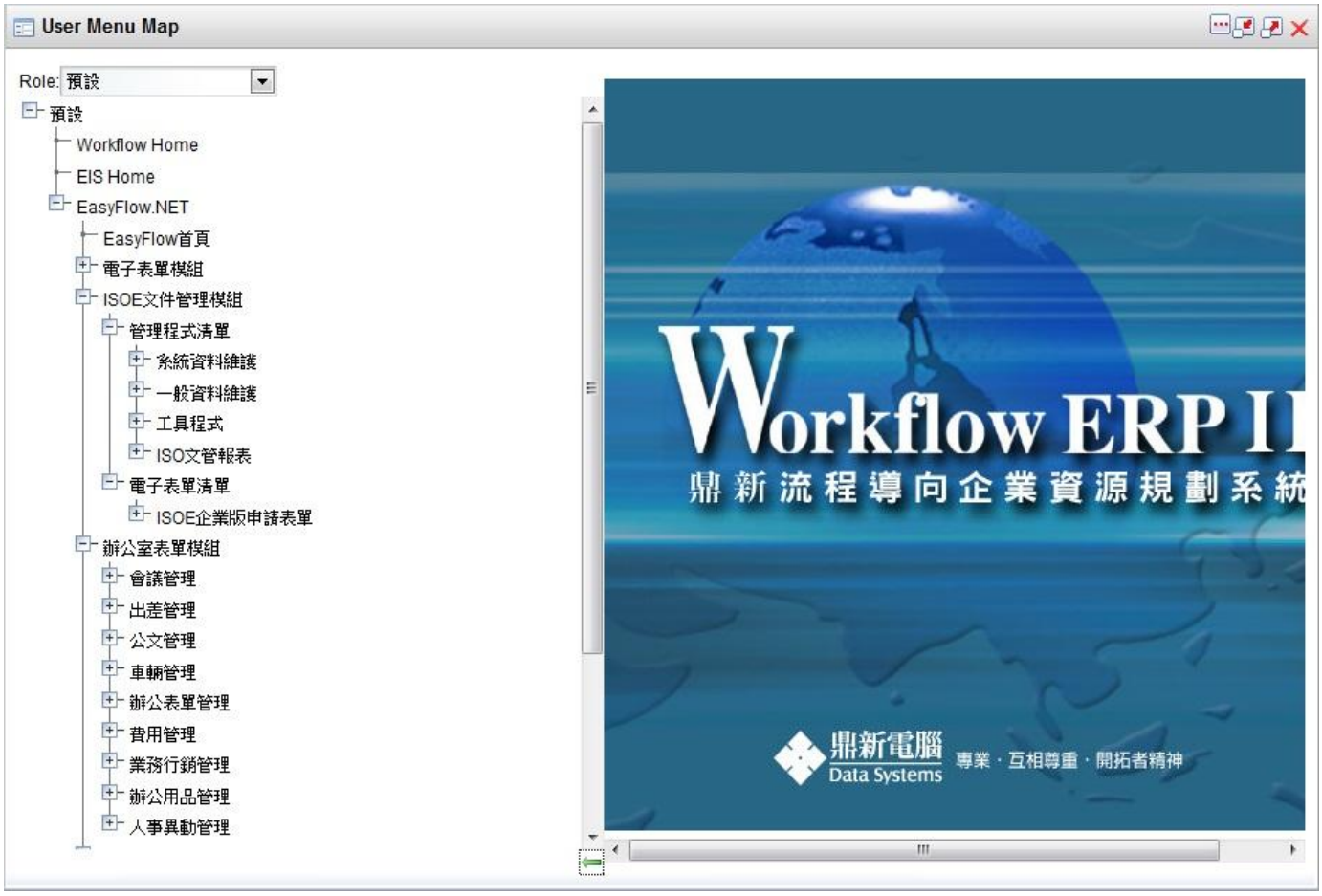
Data entity	Program list Portlet
Permitted to	Add to Page, View, Permissions, Configuration

7.5 User Menu Map

This feature provides a program list that enables the user to link to all integrated system tasks, and also displays their flowchart.

7.5.1 Open Link

Select the name of program list in “Role” and tree menu below and flowchart on the right will immediately switch. Expand the tree menu or click a corresponding item in the flowchart to start the desired task or program.



To use the functions of flowchart, be sure to have imported and set the flowchart while editing the program list.

If the system to be linked is a “Multi-company-type” structure (e.g. ERP, CRM), please select “Company” of the system to be logged in on the top right corner of the Portal system and then click the link to program list.

7.5.2 Edit User Menu Map

To edit a program list, please use “Portal MenuDesigner” tool.

7.5.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

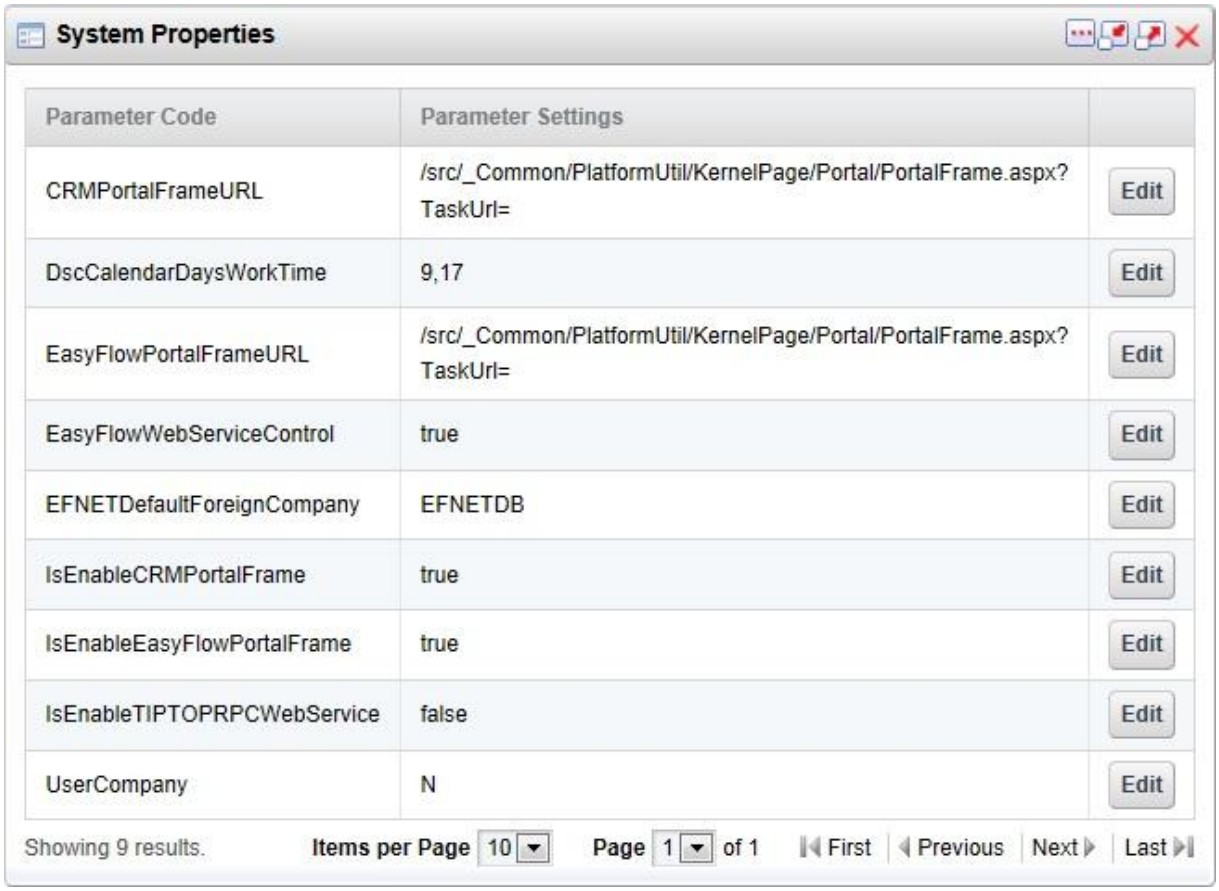
Permission setting:

Data entity	User Menu Map Portlet
Permitted to	Add to Page, View, Permissions, Configuration

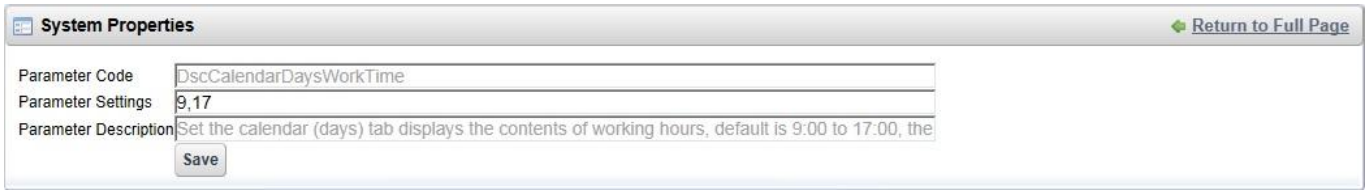
7.6 System Properties

7.6.1 View and Set System Parameters

This feature enables system administrator to set system parameters.



Press “Edit” to access the setting view. After entering “Parameter setting value”, click “Save”.



7.6.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

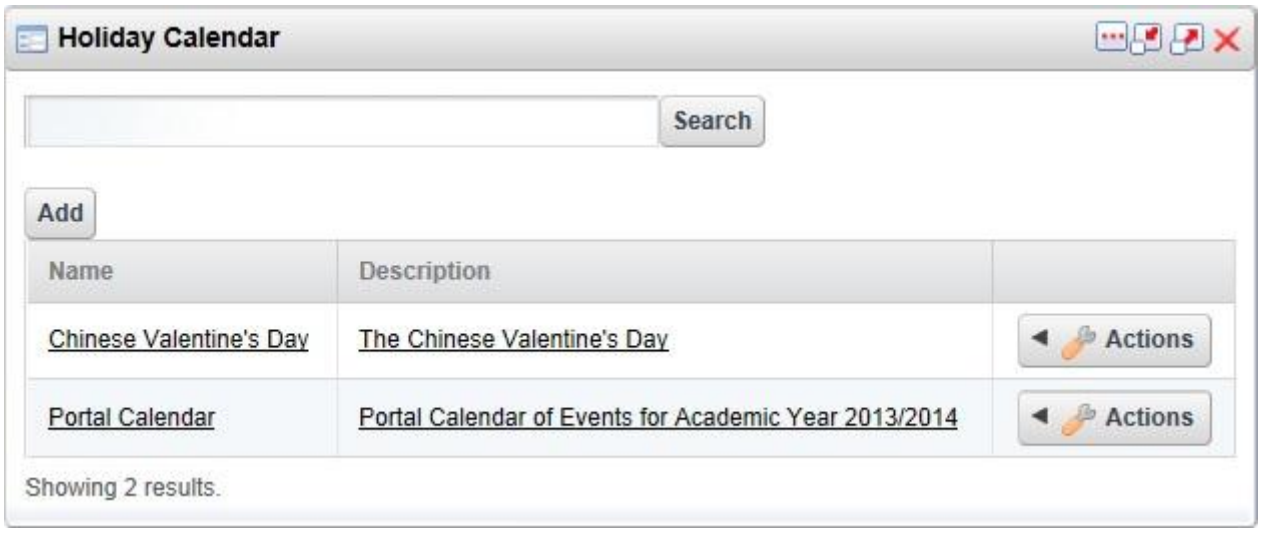
Permission setting:

Data entity	Marquee Portlet
Permitted to	Access in Control Panel, Add to Page, View, Permissions, Configuration

7.7 Holiday Calendar

This feature enables the user to create the company's holiday calendar and display the holiday on the user's personal calendar.

7.7.1 Manage Holiday Calendar

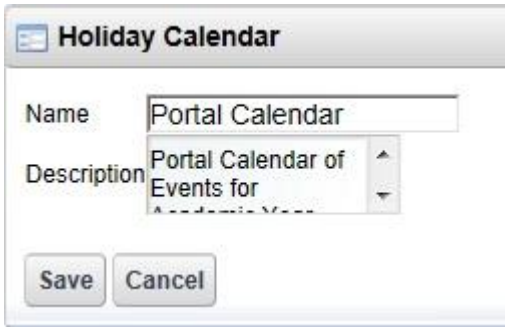


7.7.1.1 Search Calendar

After entering the keyword of holiday calendar name or description in the search field, click "Search" to search out the desired calendar.

7.7.1.2 Add Calendar

Press "Add" to access the festival/holiday calendar setting view. After entering calendar-related data, click "Save".



- Name: Enter the name of a festival/holiday calendar
- Description: Enter details of the festival/holiday calendar

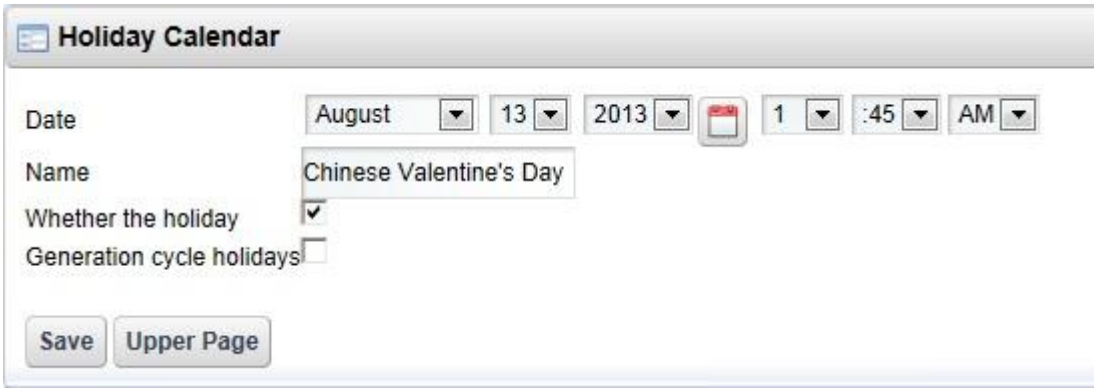
7.7.1.3 Control Calendar

Press "Actions" that follows the data entry of "Holiday Calendar" to control the holiday calendar.

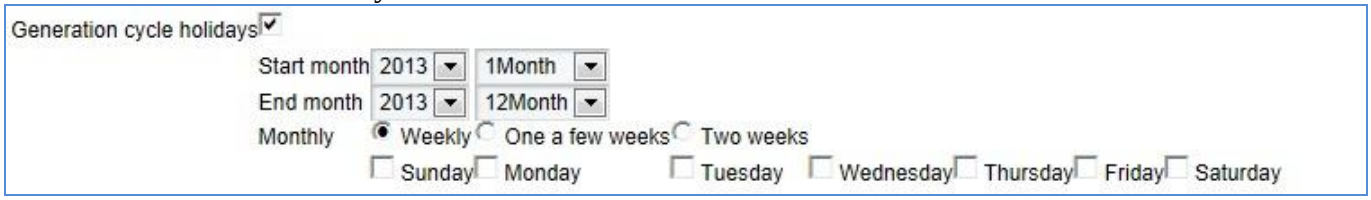
- Edit: Click "Actions" on the right of data entry and then select "Edit" to access the modification page. For data editing method, please refer to "Add calendar".
- Delete: Click "Actions" on the right of data entry and then select "Delete" to delete the festival/holiday calendar. If there have been festival/holiday data in the calendar, please remove them before deleting the calendar
- Subscription Management: Click "Actions" on the right of data entry and then select "Subscription Management" to view and manage subscription status of the holiday calendar. Please refer to "Calendar Subscription Management" section.

7.7.1.4 Add Holiday

In "Holiday Calendar" data entry click a link to access a festival/holiday calendar. Press "Add" to access the holiday setting view. After entering calendar-related data, click "Save".



- Date: Set the date of the festival/holiday
- Name: Enter the name of the festival/holiday (i.e. the name shown on a personal calendar)
- Whether the holiday: Check it if the festival/holiday is a day off; uncheck it if the festival/holiday is a celebration day but not a day off
- Generation cyclic holidays: Check it to set the rule of generating cyclic holidays
  - Start month, end month: Set the range of cyclic holidays
  - Week, day: Select which day of which week (Weekly/One a few weeks/Two weeks) of each month to be holidays



Tips For "Cyclic holidays" generated, holiday "name" cannot be set

7.7.1.5 Control Holiday

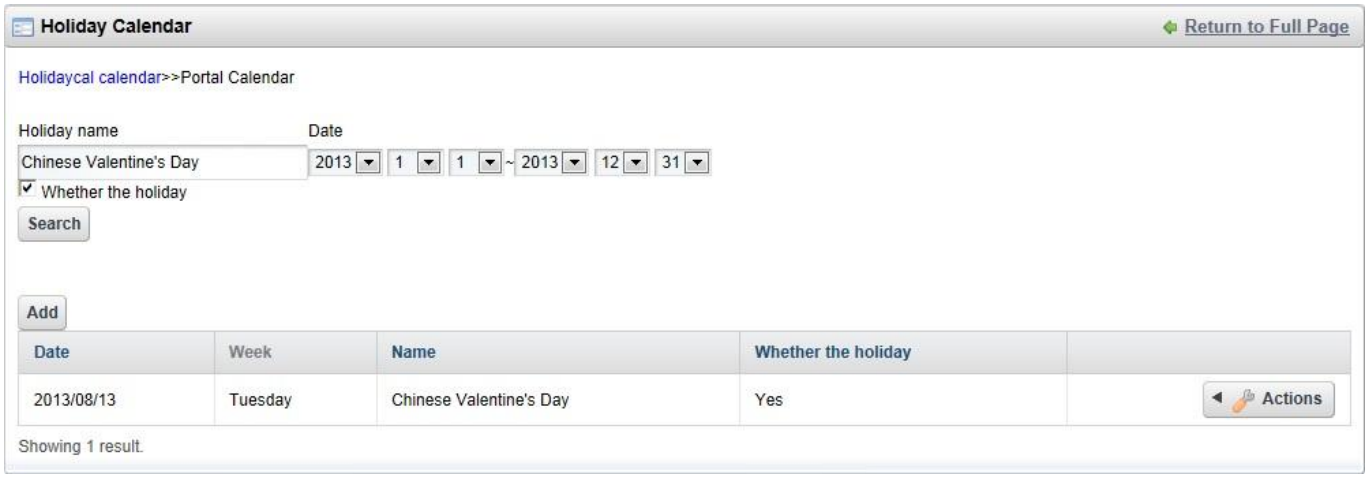
Press “Actions” that follows the data entry of “festival/holiday” to control festival/holiday data.

Date	Week	Name	Whether the holiday	
2013/08/13	Tuesday	Chinese Valentine's Day	Yes	Actions

- Edit: Click “Actions” on the right of data entry and then select “Edit” to access the modification page
- Delete: Click “Actions” on the right of data entry and then select “Delete” to delete the data

7.7.1.6 Search Holiday

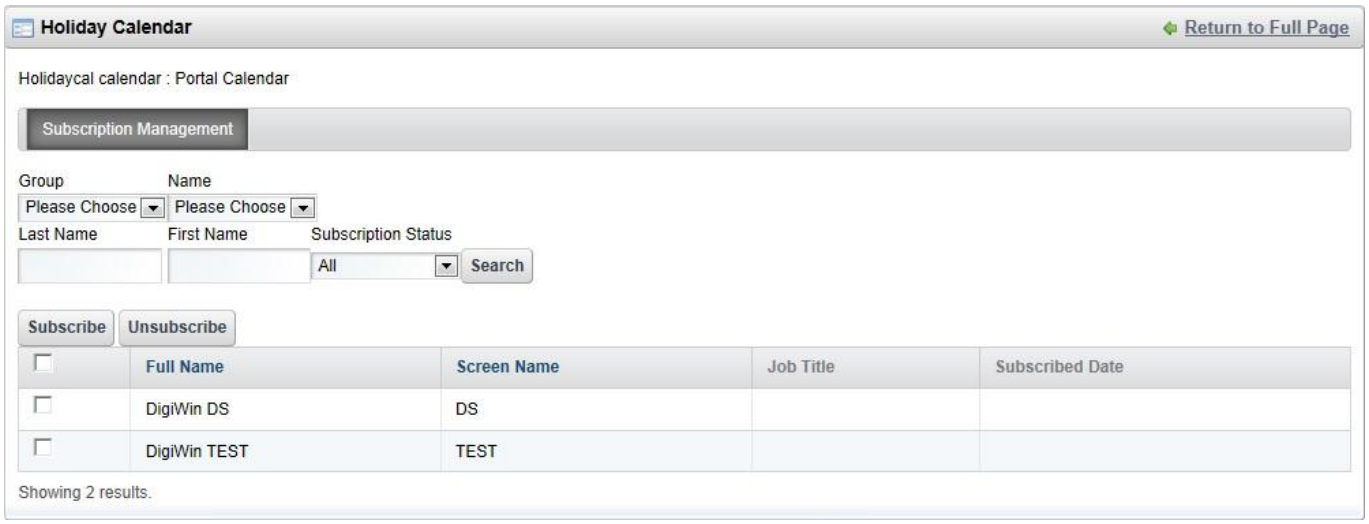
After accessing a holiday calendar and entering search conditions, click “Search”. Results that meet the conditions will be listed below. Search conditions that may be entered include: Holiday name (or a keyword), start date and end date of the holiday.



7.7.2 Calendar Subscription Management

Tips The user needs to subscribe to a calendar to view the details of the holiday calendar on his/her personal calendar.

This feature enables the user to manage subscription data of a festival/holiday calendar, to query and view current subscription status, and to make and cancel a subscription.



Setting method: Go to “Holiday calendar” list, click “Actions” on the right and then select “Subscription Management” to access the subscription management page.

- Query subscription status: Enter query conditions and click “Search”, and the results that meet such conditions will be displayed below. “Subscription date” with data filled in means the user has subscribed to the holiday calendar; the blank one means no subscription
- Subscribe: Check the user who plans to subscribe to the holiday calendar and then click “Subscribe”
- Unsubscribe: Check the user who plans to cancel the subscription to the holiday calendar and then click “Unsubscribe”

7.7.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

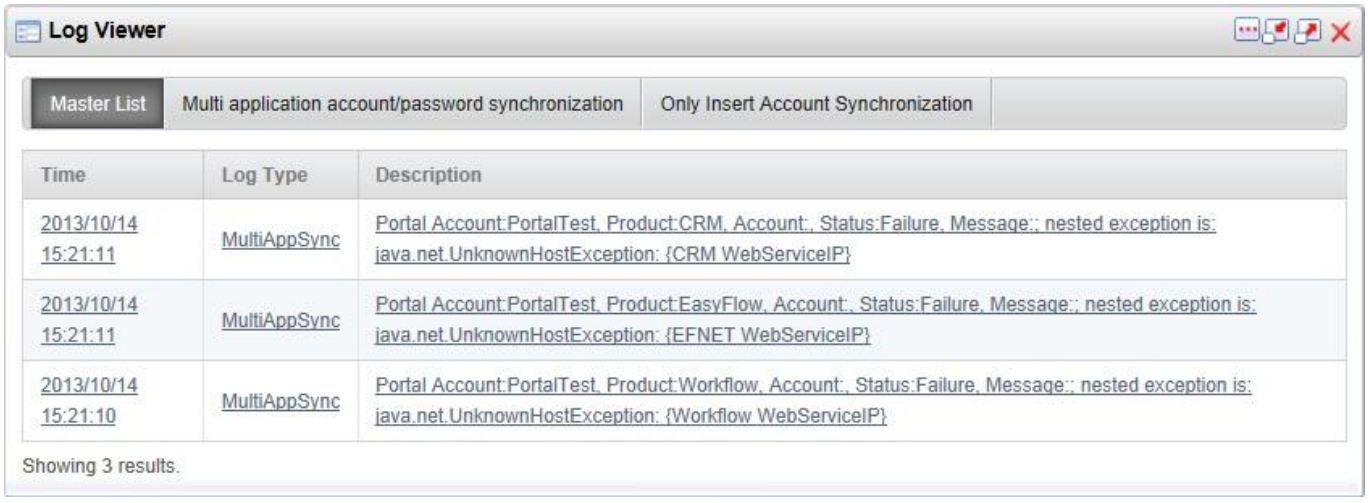
Data entity	Holiday Calendar Portlet
Permitted to	Add to Page, View, Permissions, Configuration

7.8 Log Viewer

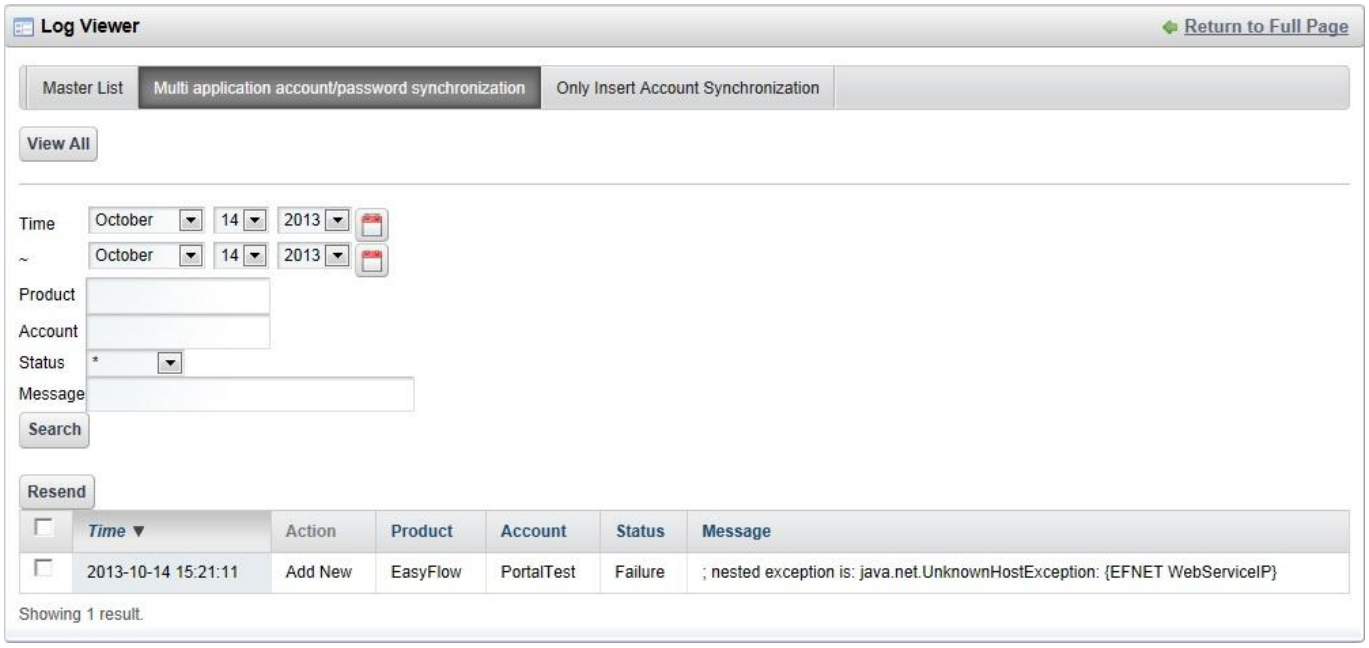
This feature allows Portlet for different purposes to record information and facilitate query, browsing or operation. *(Only MultiAppSync and MdmQueue are currently supported. Please refer to 8.1.4 Account/Password Sync Settings.)*

7.8.1 Log View Summary

It displays the time, Log type and description of recently recorded Log messages.

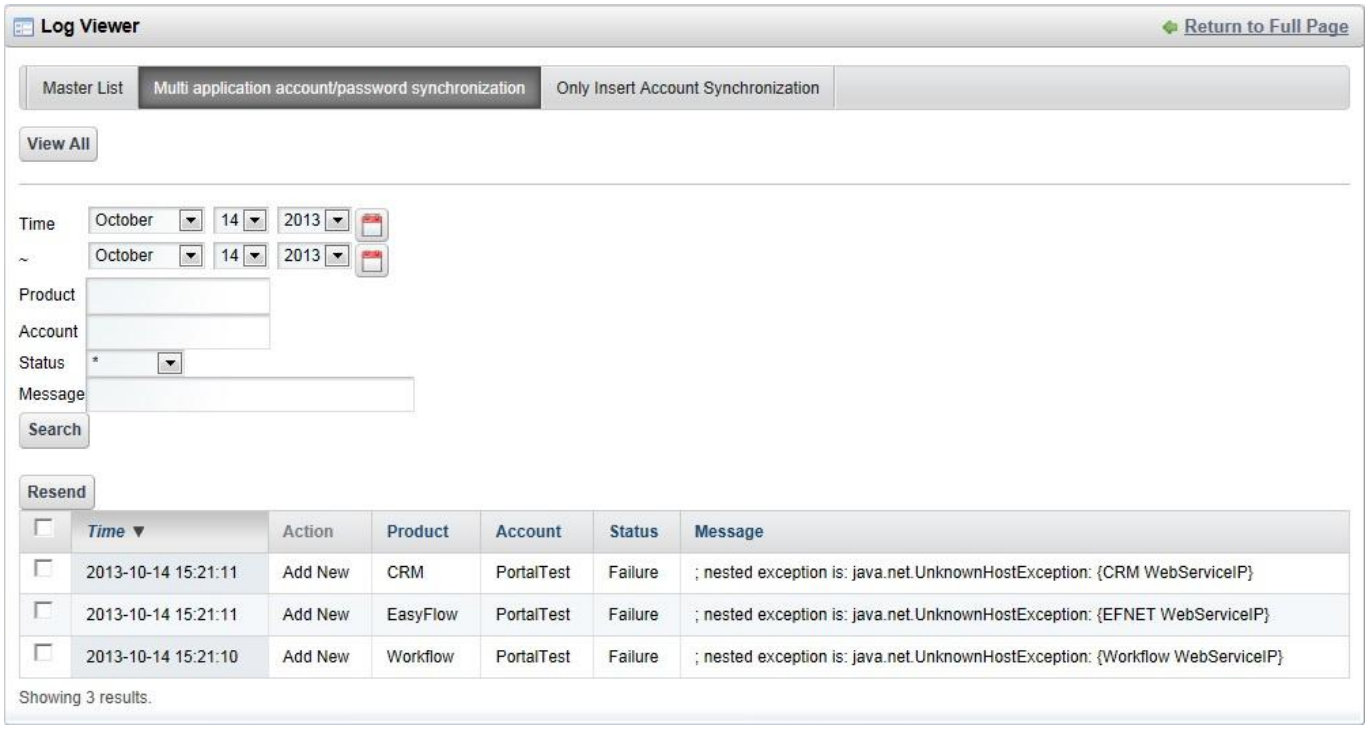


Click a data entry to open the corresponding tab and display the information of the message. The following is the result of clicking the middle data entry in the figure above.



7.8.2 Multi Application Account/password Synchronization

Please refer to 8.1.4 Account/Password Sync Settings.



7.8.2.1 Search Multi Application Account/password Synchronization Data

After entering the keyword of related name or description in the search field, click “Search” to search out the status of the corresponding MultiAppSync.

- Time: Select the date range to be searched
- Product: Enter product name
- Account: Enter the user's account
- Status: Select from drop-down options
- Message: Enter the keyword of the message

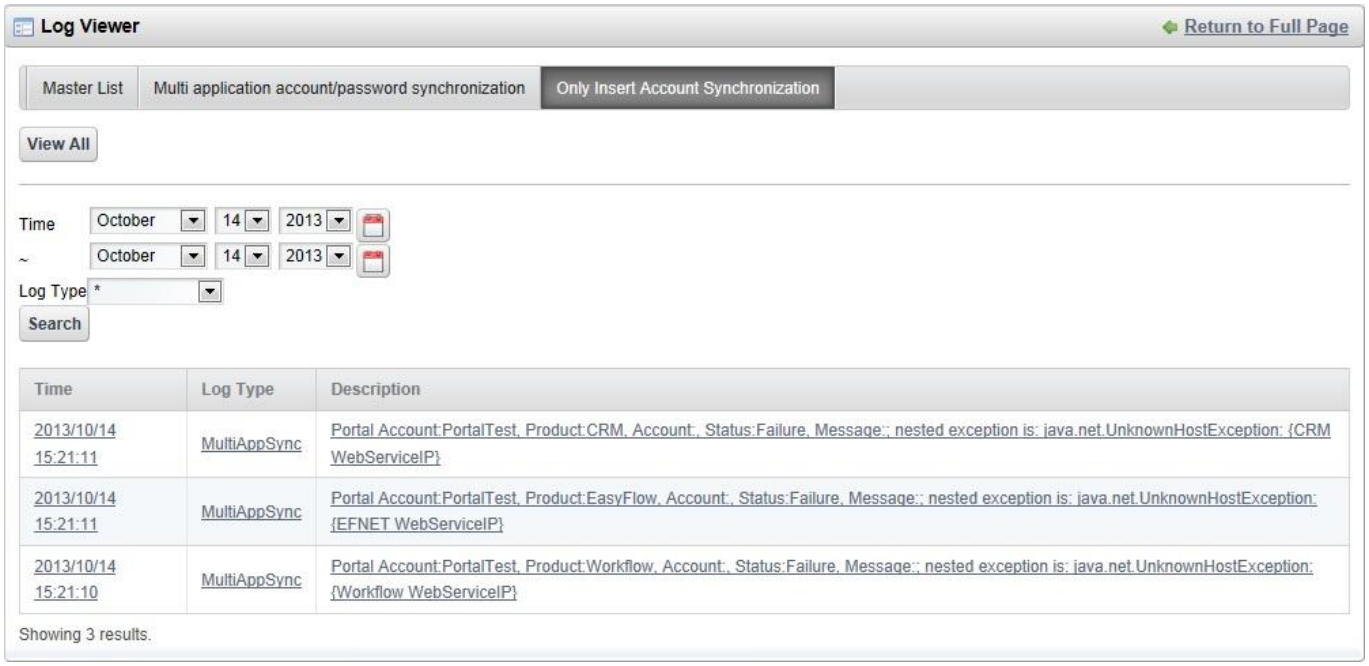
7.8.2.2 Operation Function

Check the data for which a synchronization message should be sent and click "Resend" to send account/password synchronization message immediately to other products.

7.8.3 Only Insert Account Synchronization

Please refer to 8.1.4 Account/Password Sync Settings.

This function replaces MDM resending process before Portal 2.6.0.



7.8.3.1 Search Only Insert Account Synchronization Data

After entering the keyword of related name or description in the search field, click "Search" to search out the status of the corresponding MdmQueue.

- Time: Select the date range to be searched
- Product: Enter product name
- Account: Enter the user's account
- Status: Select from drop-down options
- Message: Enter the keyword of the message

7.8.3.2 Operation Function

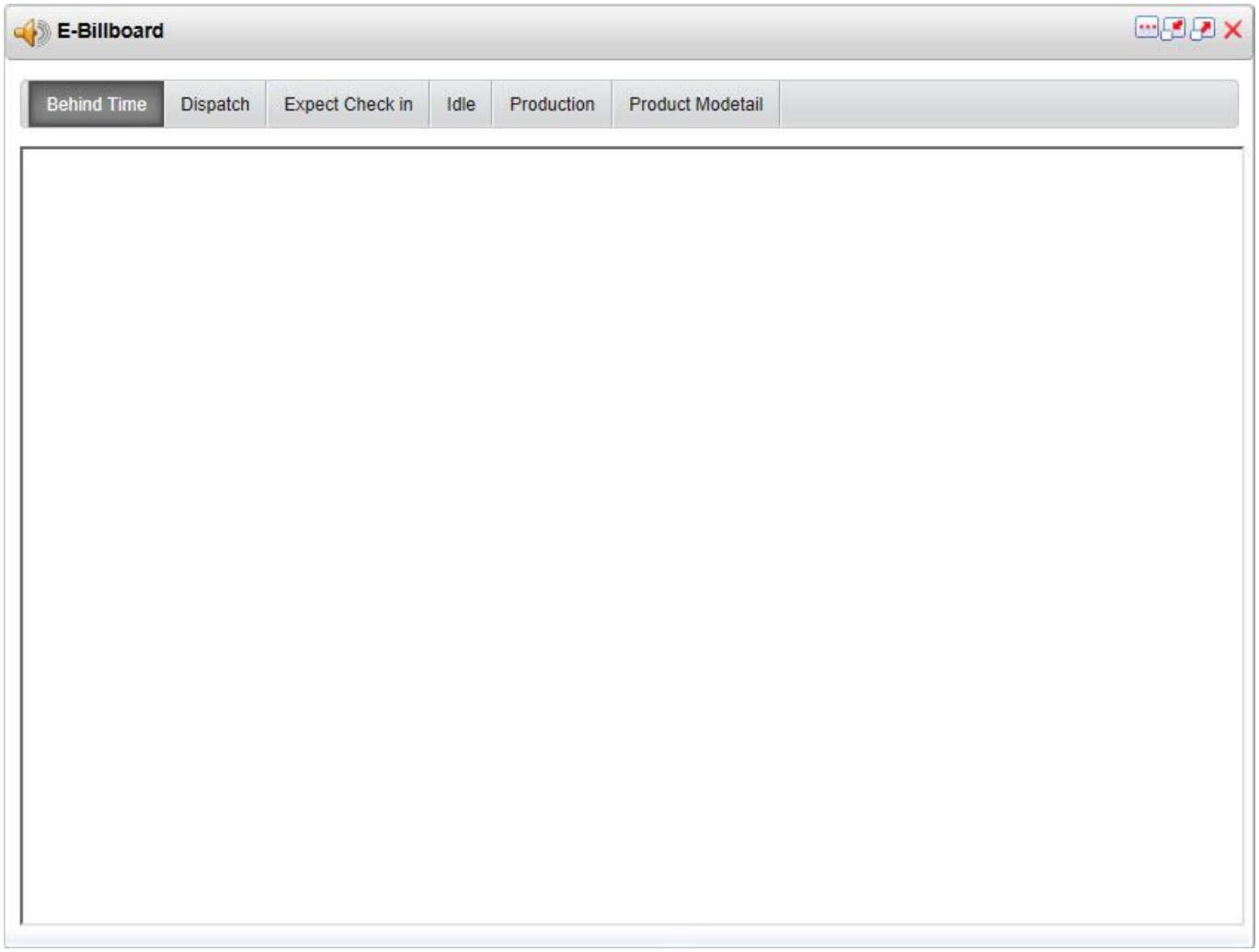
Check the data for which a synchronization message should be sent and click "Resend" to send account/password synchronization message immediately to other products.

7.9 E-Billboard

This feature enables the user to view various E-Billboard in SFT system, including Behind Time, Dispatch, Expect Check in, Idle, Production, Product Modetail, and to edit URLs.
※Prior to the use of this module, SFT system and PORTAL system must be integrated!

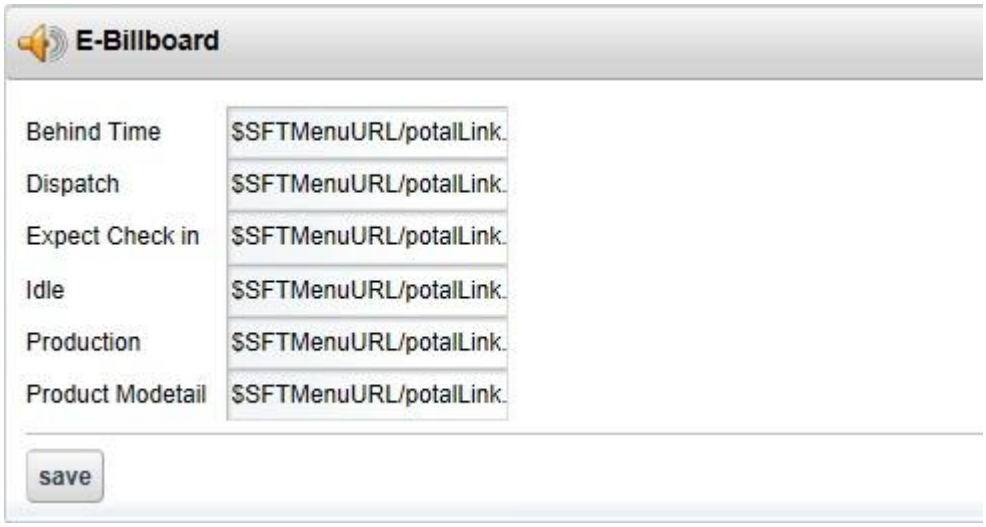
7.9.1 View E-Billboard

Click the tab of various electronic KanBans on the top to view the corresponding KanBan.



7.9.2 Edit URL of E-Billboard

Press “Preferences” in Portlet toolbar to access the setting page. Enter the URL of each KanBan in the URL box of each KanBan. After modifying related data, click “Save”.



7.9.3 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	E-Billboard Portlet
Permitted to	Preferences, Access in Control Panel, Add to Page, View, Permissions, Configuration

7.10 Data Mask Rule

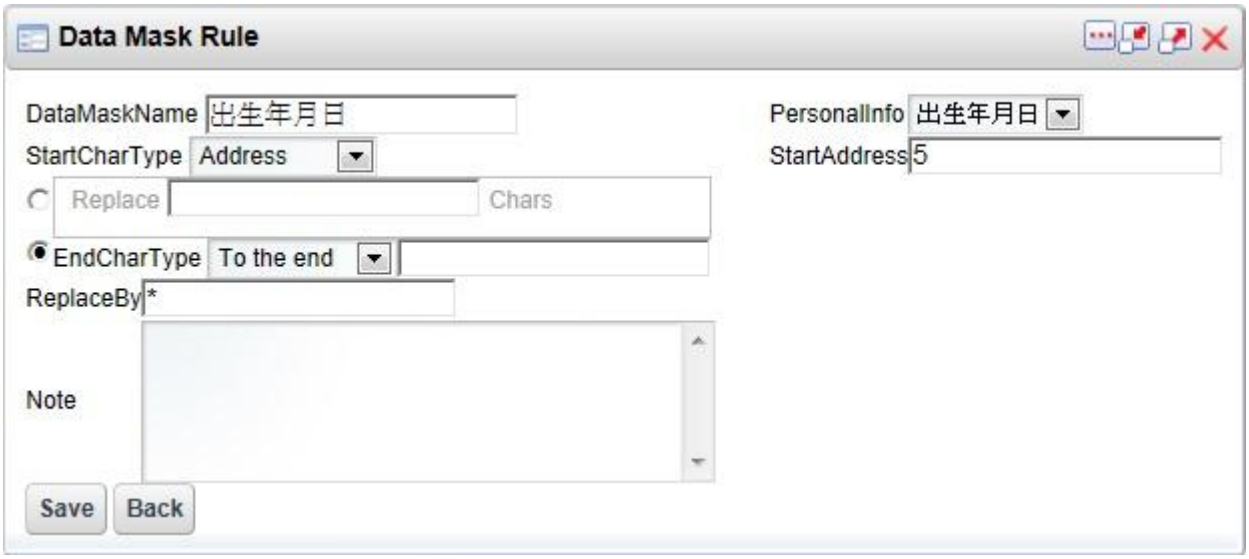
This feature enables the administrator to create system masking rules, which may apply to all Portlets.

7.10.1 Manage Data Mask Rule

7.10.1.1 Control Data Mask Rule

Press “Actions” that follows the data entry of “Data Mask Rule” to control data masking rules.

- Edit: Click “Actions” on the right of data entry and then select “Edit” to access the modification page. After entering related data, click “Save”.



- DataMaskName: Enter the name of masking rule
- PersonalInfo: Select personal information field to be masked
- StartCharType: Select position or character. If a position is selected, it means the substitution starts from Position X. If a character is selected, it means the substitution starts from the first specific character X
- StartAddress: Enter the position or specific character according to type.
- EndCharType: Select position, character or to suffix. If a position is selected, it means the substitution starts from Position X. If a character is selected, it means the substitution starts from the first specific character X. If “To suffix” is selected, it means the substitution ends on suffix.
- EndAddress: Enter the position or specific character according to type.
- ReplaceBy: Substitute “*” for the character within the scope

7.10.2 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Data Mask Rule Portlet
Permitted to	Add to Page, ADD_DATAMASKRULE, View, Permissions, Configuration

7.11 Query Designer-management

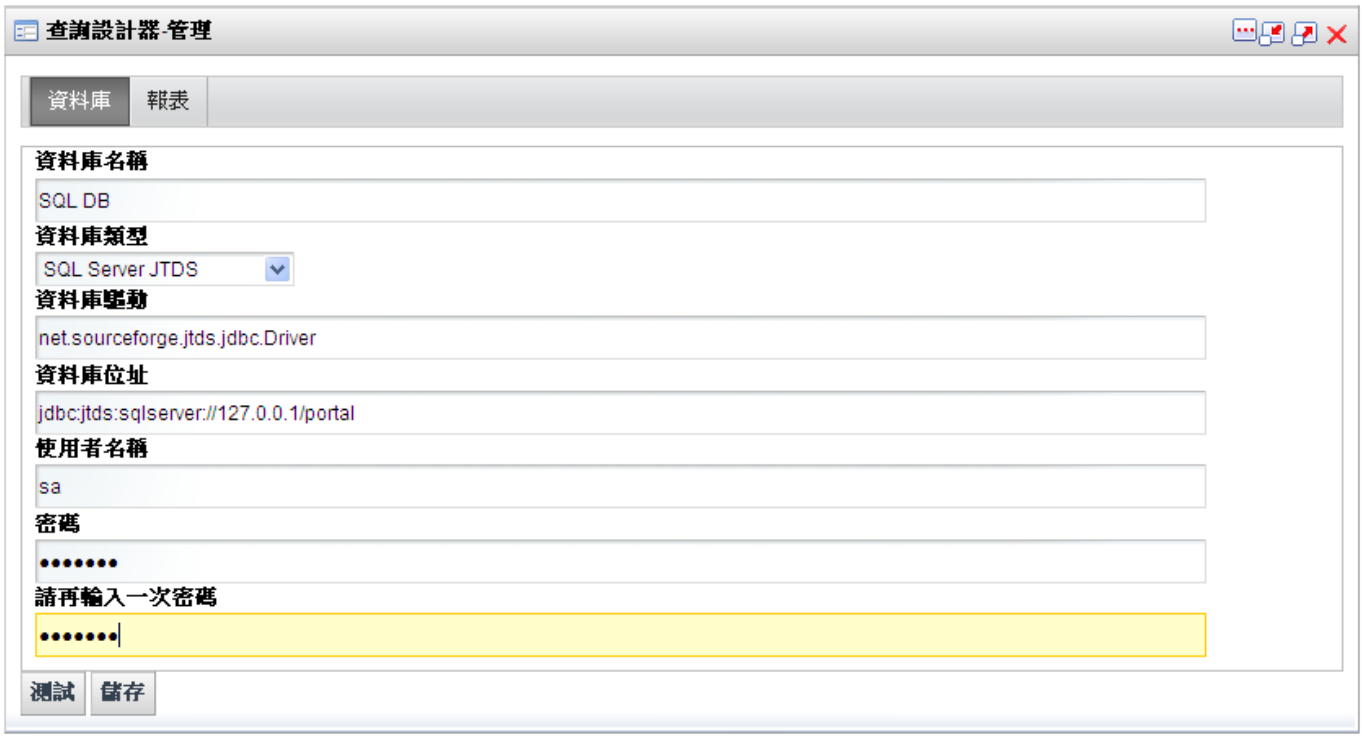
This feature enables the administrator to query database easily.

7.11.1 Manage Database

7.11.1.1 Add Database

Click “Database” tab and press “Add database”

After entering related data, click “Test” to test whether information in the database is correct. Click “Save” to complete the addition.



- Database name: Enter the name of a database
- Database type: Select the type of the database (SQL Server JTDS/HSQL Standalone Mode/Oracle JDBC Thin/MySQL/tSQL)
- Database drive: Automatically generated along with database type selected by the administrator
- Database address: Enter the address of the database
- User name: Enter the name of the user
- Password: Enter the password
- Please enter the password again: Enter the password again

7.11.1.2 Control Database

Press “Activity” that follows the data entry of “Database” to control database.

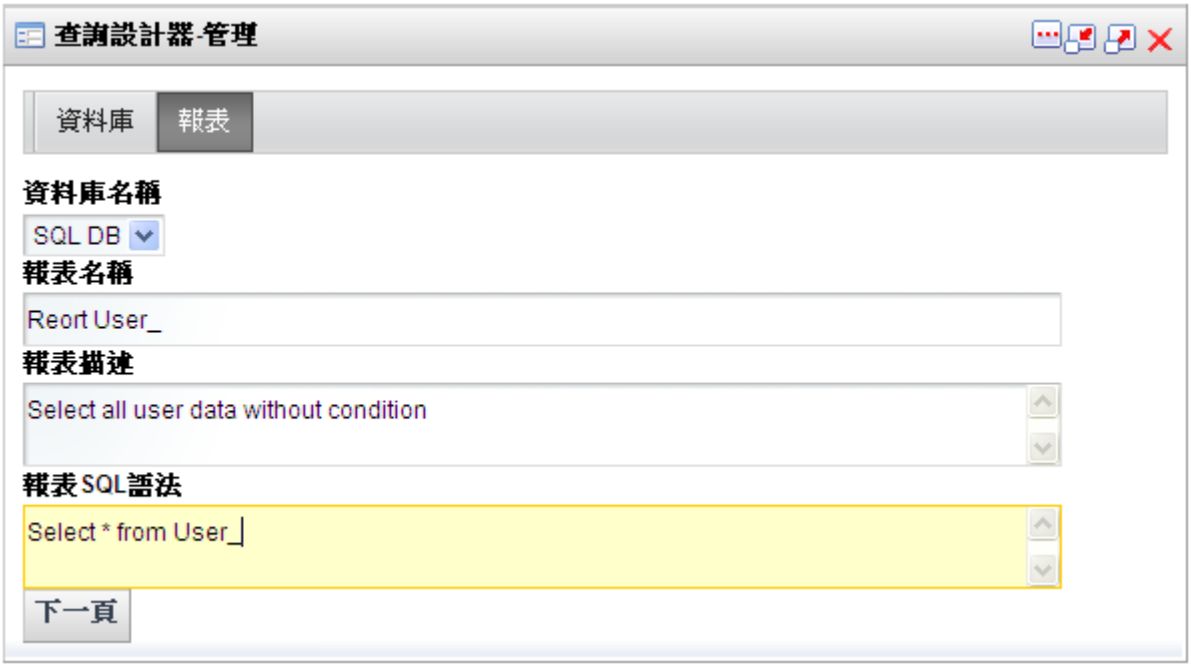
- Edit: Click “Activity” on the right of data entry and then select “Edit” to access the modification page. After entering related data, click “Save”
- Delete: Press “Activity” on the right of the data entry and then select “Delete” to delete the information of the database

7.11.2 Manage Report

7.11.2.1 Add Report

Click “Report” tab and press “Add report”

After entering related data, click “Next” to complete the addition.



- Database name: Select the name of a database
- Report name: Enter the name of the report
- Report description: Enter the description of the report
- Report SQL syntax: Enter SQL syntax

7.11.2.2 Control report

Select the report to be controlled and use the three buttons below, i.e., “Edit report”, “Delete report” and “View report” to control reports.

- Edit report: Select the report to be controlled and then click “Edit report” to access modification page. After entering related data, click “Next” to complete the editing
- Delete report: Select the report to be controlled and then click “Delete report” to delete the information of the report
- View report: Select the report to be controlled and then click “View report” to view the information of the report

7.11.3 Portlet Permission Setting

Press “Setting” in Portlet toolbar to access the permission setting page.

Permission setting:

Data entity	Query designer-management Portlet
Permitted to	Control database, control report, add to page, view, permission, setting

7.12 Query Designer-view

This feature enables the user to view the data of a particular report.

7.12.1 Add Report

Click the tool icon on the bottom left to access the add report page. After entering related data, click “Save” to complete the addition.

7.12.2 Portlet Permission Setting

Press “Setting” in Portlet toolbar to access the permission setting page.

Permission setting:

Data entity	Query designer-view Portlet
Permitted to	Export report, set report, add to page, view, permission, setting

8. Integration Setting

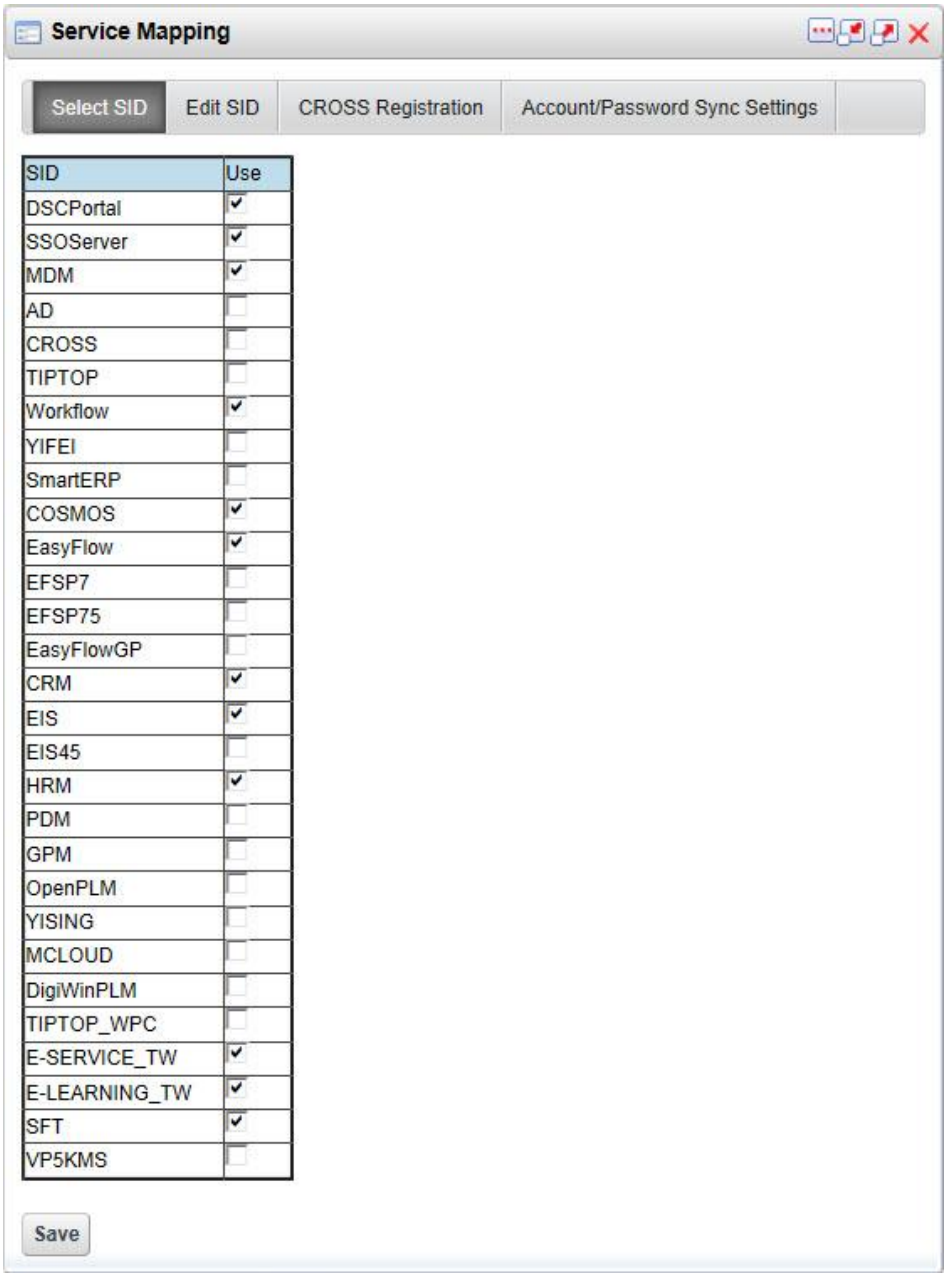
8.1 SSO System Setting

This enables system administrator to perform the setting of Portal integration environment.
※Please avoid making modification frequently as this may affect the functionality of Single Sign On integration!

8.1.1 Select SID

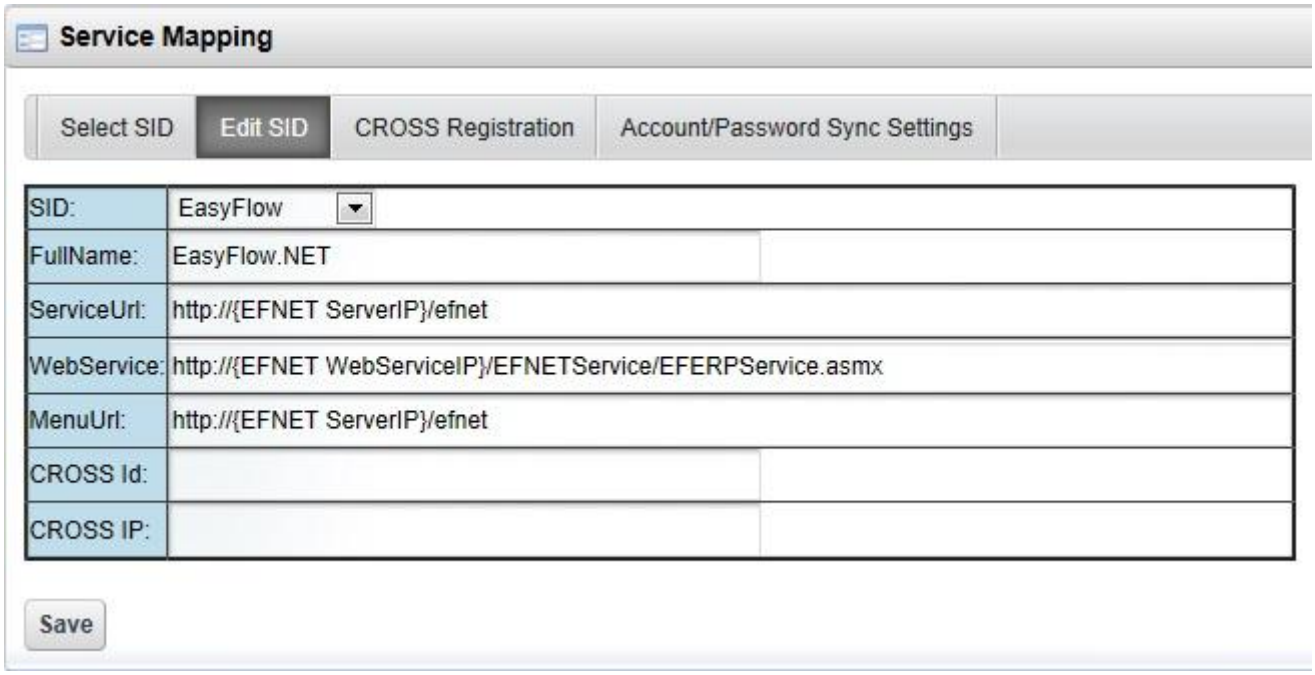
Click “Select SID” tab, check integrated systems according to actual installation and then click “Save”.

Tips DSCPortal, SSOServer, MDM: The first three items are basic settings. Please do not uncheck them.



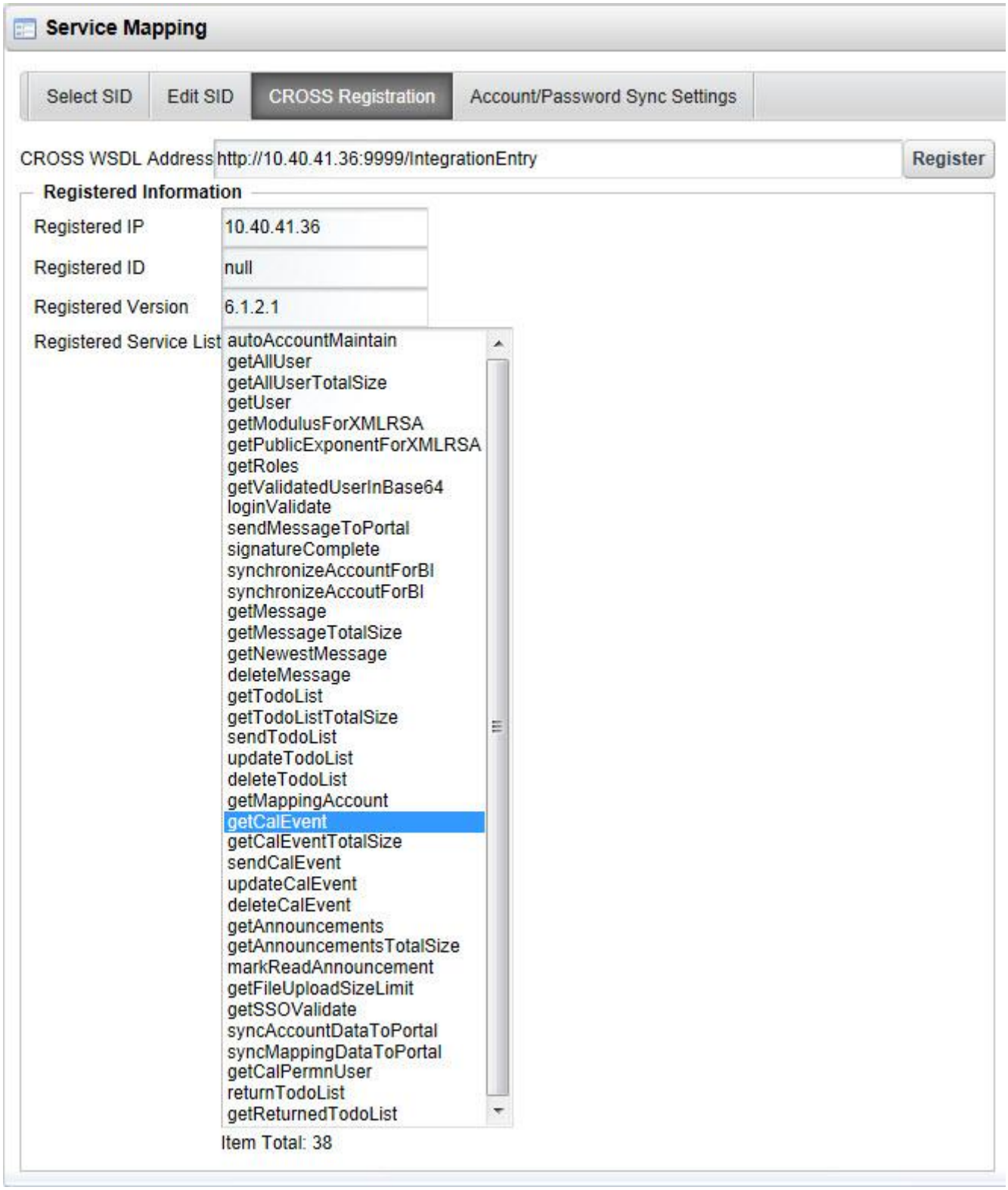
8.1.2 Edit SID

Click “Edit SID” tab. In “SID”, select the system to be edited and enter related parameters, and then click “Save”.



8.1.3 CROSS Registration

Click “CROSS Registration” tab. In “CROSS WSDL Address”, enter WSDL address of CROSS, and then click “Register”. Currently registered information will appear in “Registered information”.



8.1.4 Account/Password Sync Settings

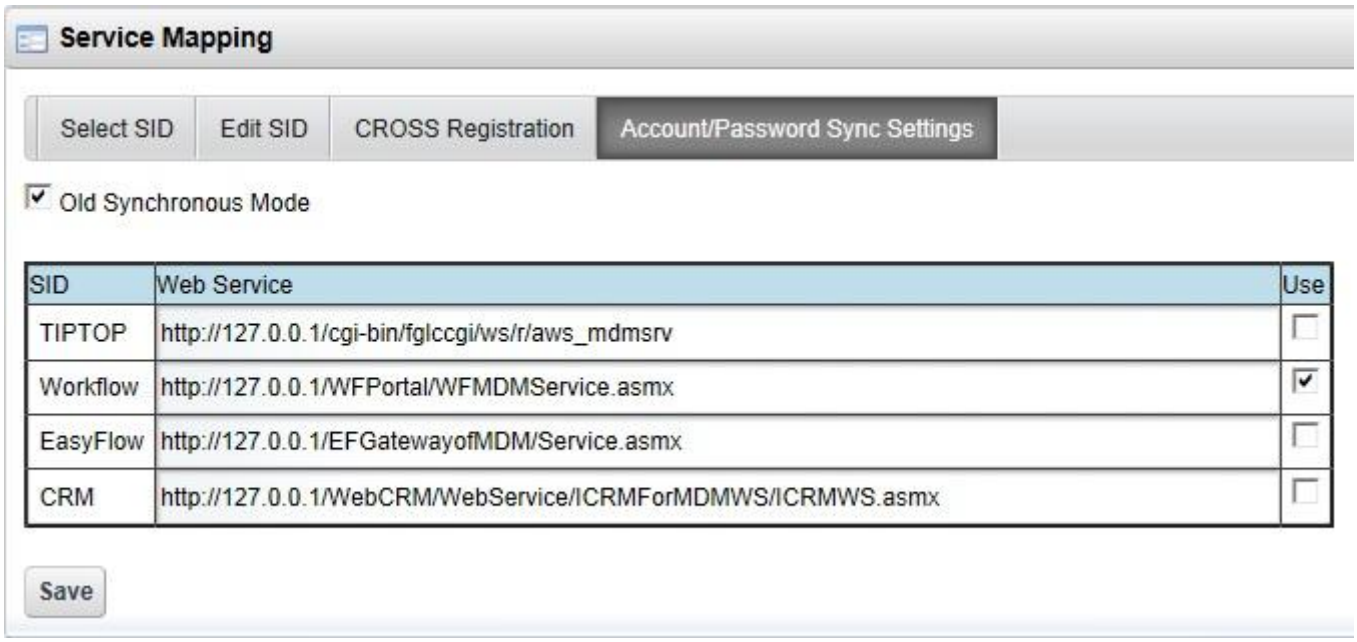
Account/Password Sync Settings falls into two modes:

- Old Synchronous Mode

  “Synchronizing to other systems only when adding Portal user account” substitutes former “MDM

synchronizing account information to other systems while adding user". Under this mode, "Old Synchronous Mode" must be checked, Web Service URL website address of the product below must be set correctly, and "Use" field must be checked.

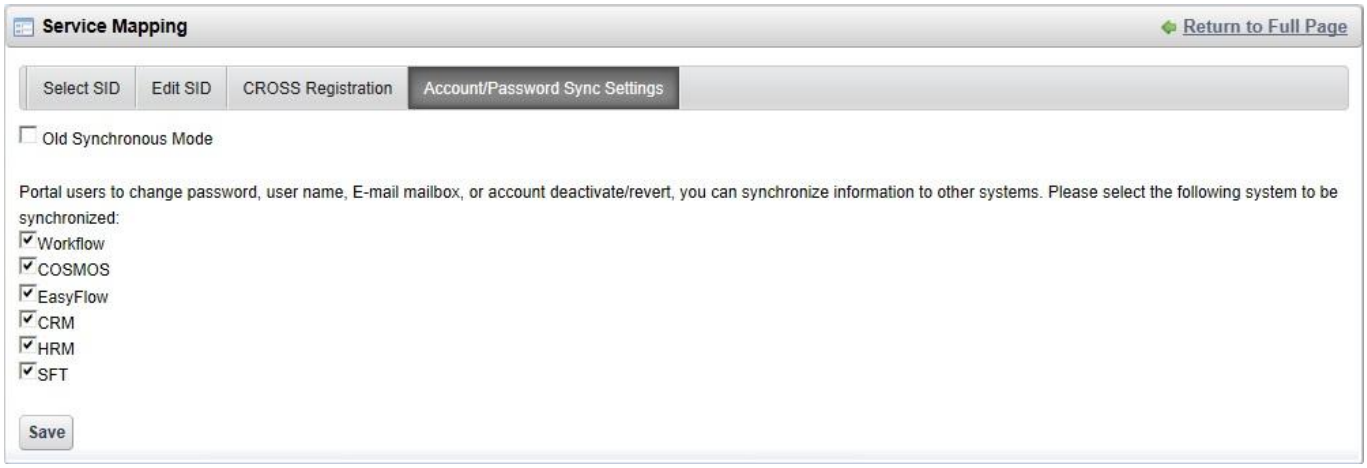
In the figure below, by checking Workflow system, the user may synchronize the new account to Workflow system while adding a Portal user account.



- New Synchronous Mode

By unchecking "Old Synchronous Mode", the user may activate the new synchronization mode. This mode will synchronize user account information to other systems during Portal user account addition, login password modification, user name, E-mail box, or account cancellation/restoration.

If Use field is checked in "Select system" tab and the system has this function, system names will be listed below for the user to check systems to be synchronized.

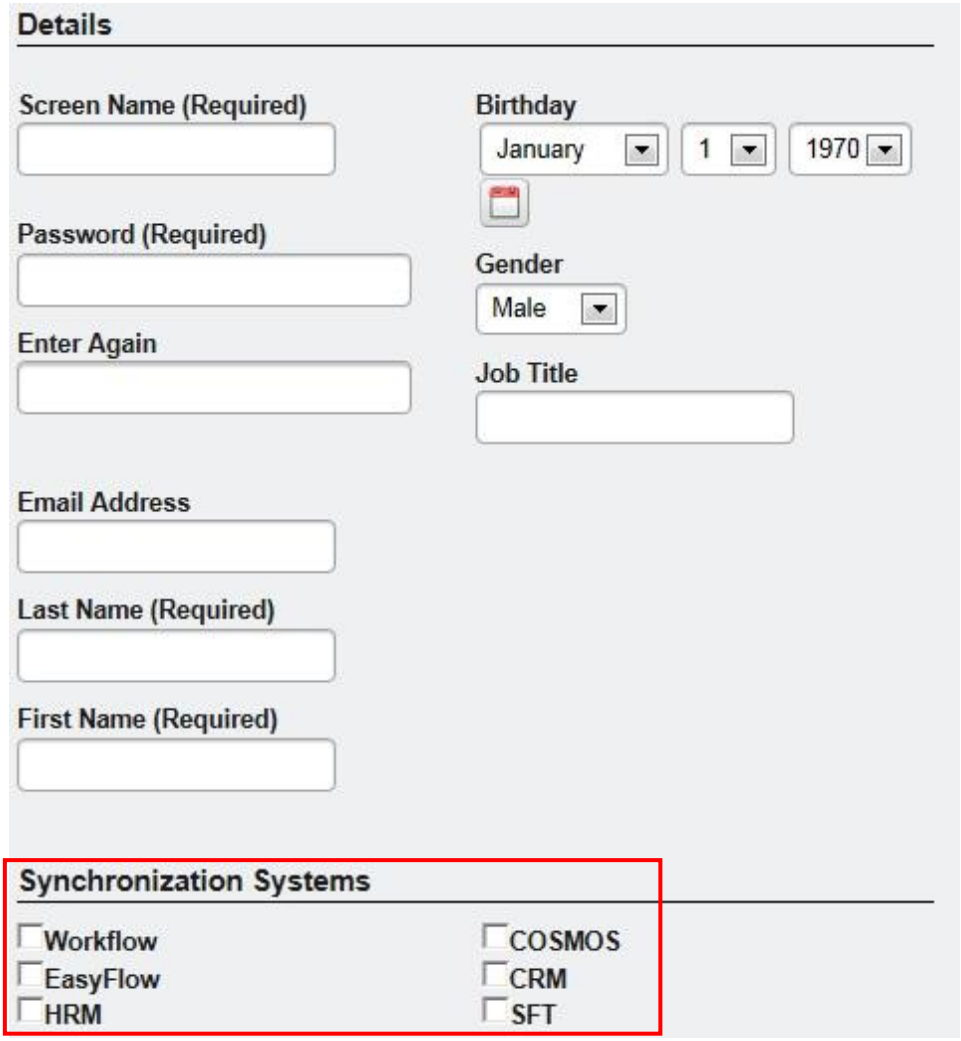


Tips The synchronization of added Portal user accounts is not included in the systems checked here.

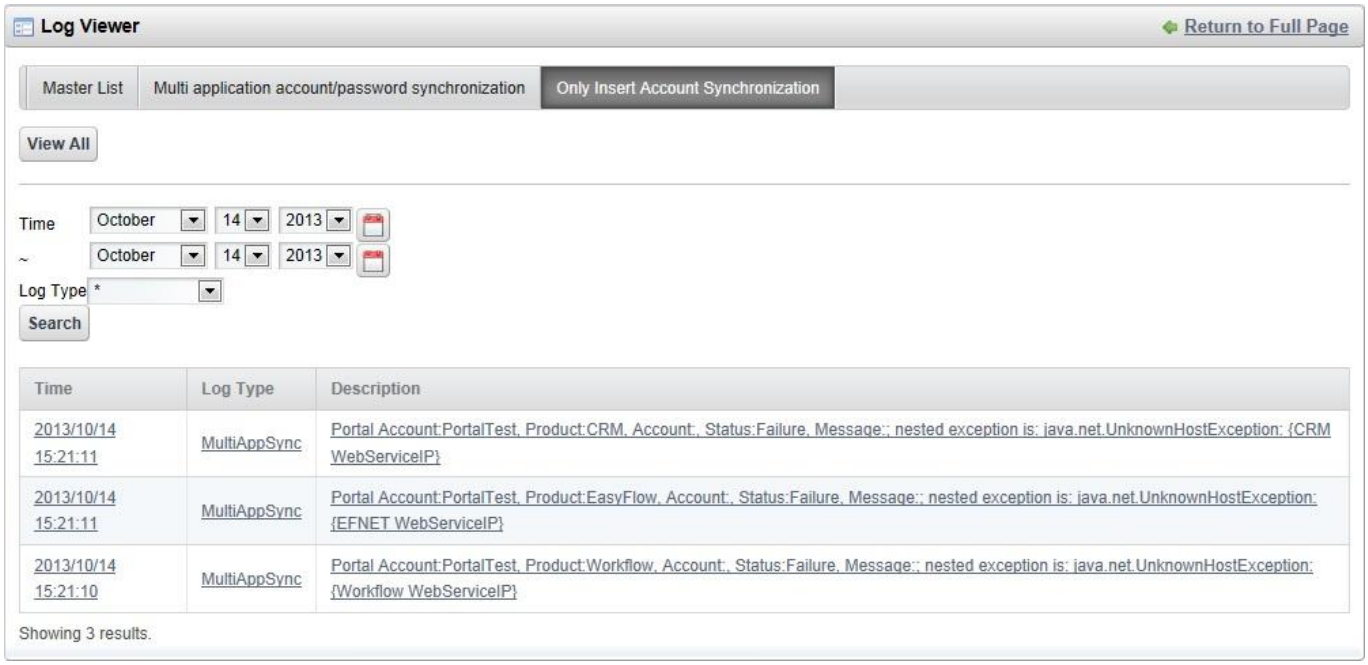
Products integrated with this function:

Product	Min. version requirement
TIPTOP	5.10.21、5.25.07、5.30.01
Workflow	3.14
SmartERP	8.2.3
Cosmos	9.3.6
EasyFlow.NET	3.3
EasyFlow GP	3.7
CRM	6.2.6
HRM	2.3.86.0
SFT	Dependent on Workflow version
YIXING	6.0

Under the new synchronization mode, while adding Portal users, the user will see the name of all systems below. After checking certain systems, click “Save” to synchronize user account information to checked systems, as shown below.



The result of synchronization messages related to the above two Account/Password Sync modes will be recorded in “Log Viewer” Portlet and correspond to the Portlet’s “Only Insert Account Synchronization” and “Account/Password Sync” tab, and the mechanism of sending failed synchronization message can be checked.



8.1.5 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

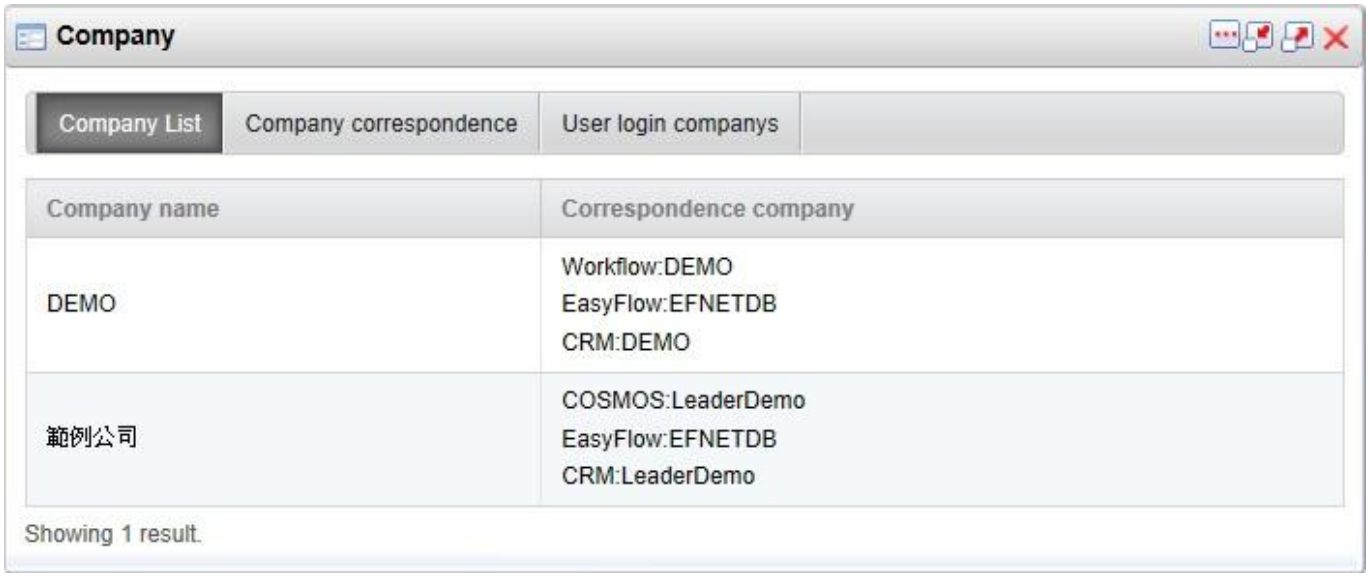
Data entity	Service Mapping Portlet
Permitted to	Access in Control Panel, Add to Page, View, Permissions, Configuration

8.2 Company

Some products of DigiWin support “Multi-company-type structure”. If your Portal integration environment contains those products, please set the corresponding company type list in Portal according to the following instructions.

8.2.1 View Company List

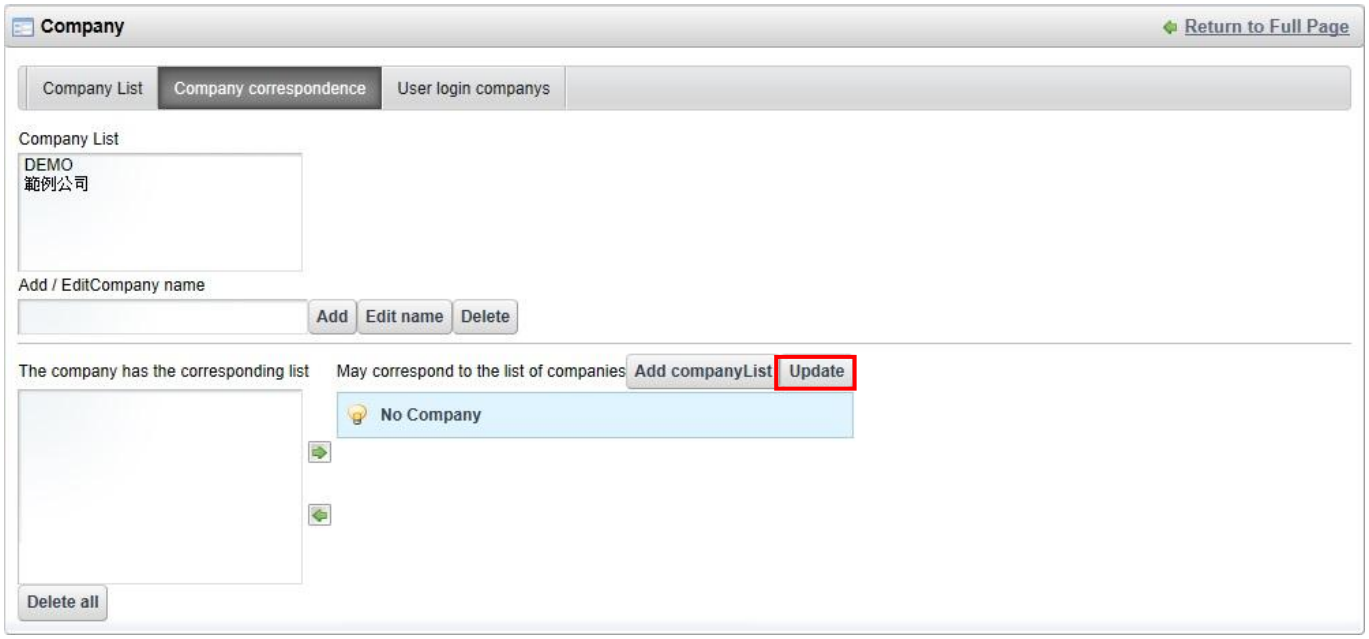
This feature enables the administrator to view currently set company lists.



8.2.2 Update Company List

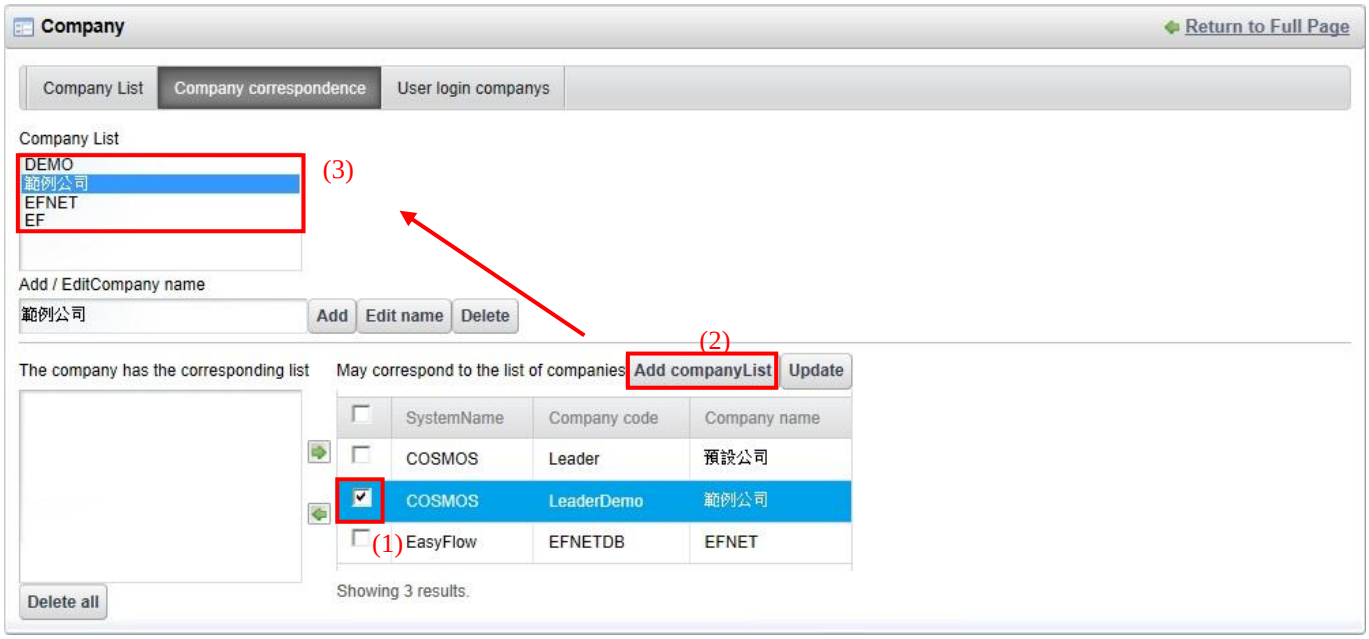
8.2.2.1 Get Company List of All Systems

Switch to “Company correspondence” tab and click “Update” to retrieve the latest company type data of all integrated systems, and display them in the following list.



8.2.2.2 Import Company List

This feature enables the user to quickly import company type list. Please perform the setting with reference to the following numbers:



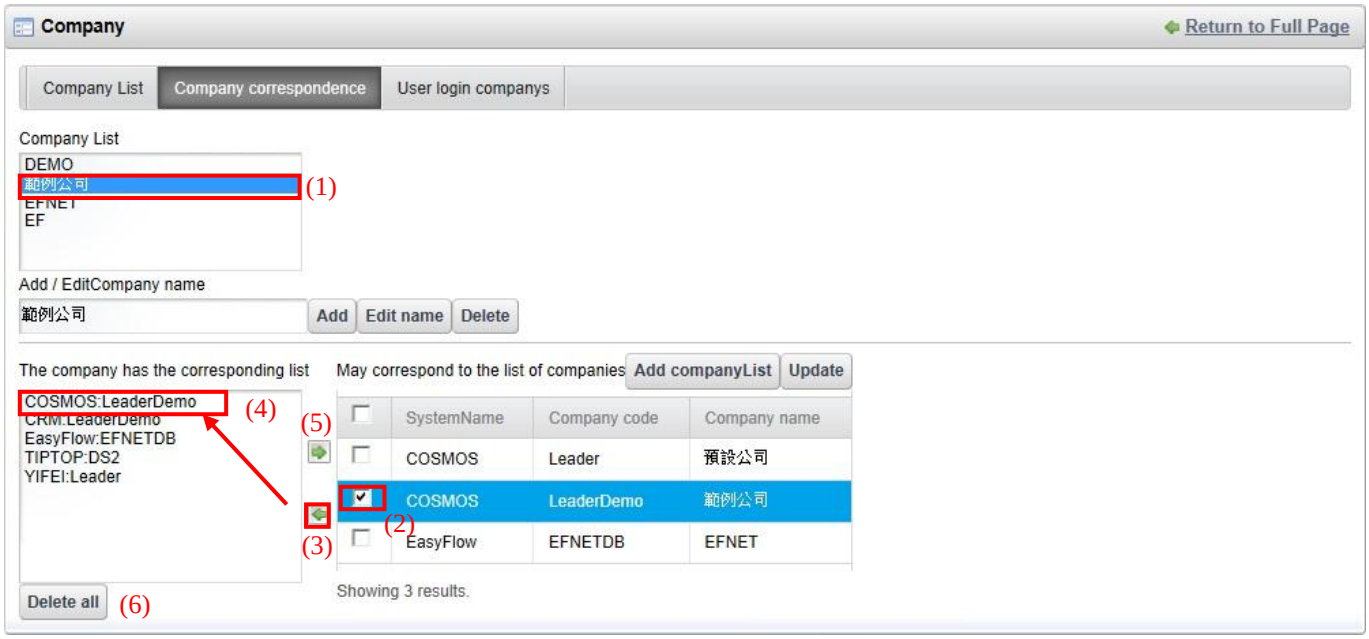
(1) Check COSMOS company type

(2) Press “Add Company List”

(3) to add the selected items to “Company List”

8.2.2.3 Set Company Type Correspondence

After creating a “Company type list”, company types corresponding to all systems must be designated one by one. Please perform the setting with reference to the following numbers:



(1) Select a company

(2) Check “Company code” of each system corresponding to the company type

(3) Press to add the selected items to corresponding list

(4) Complete the company type correspondence

(5) To remove a single item from the correspondence list, select the item and press

(6) To remove all items from the correspondence list, press “Delete all”

Please complete the correspondence setting of “Company list” one by one accordingly.

8.2.3 Set User Login Company

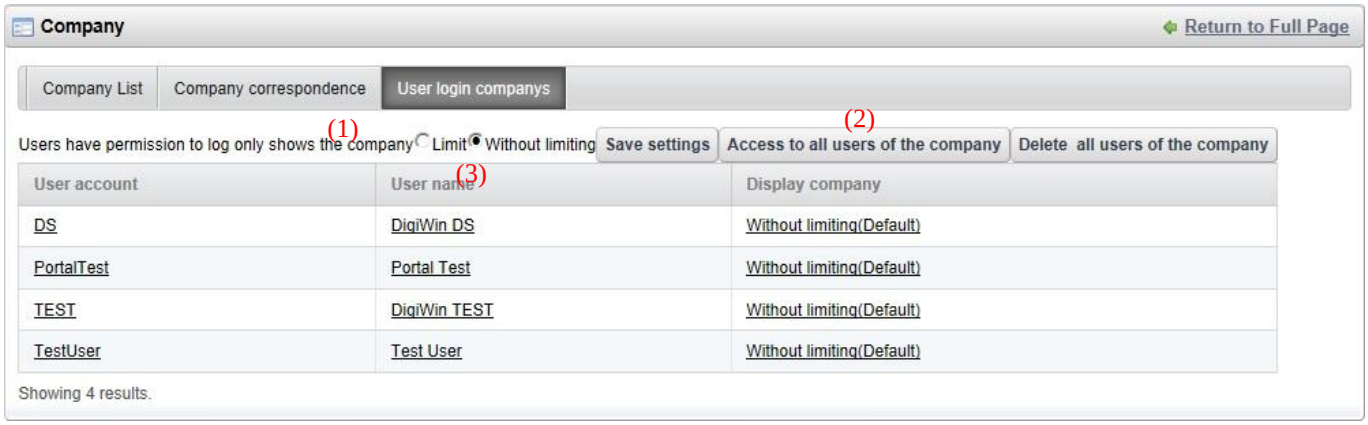
This setting only intends to restrict the user’s access to the company type in Portal. Whether the user has the actual permission to access the company type, however, should depend on the permission setting in the former integrated system.

Description of company type permission:
“Limit”: It means the user can only see company type options to which he/she is given permission (user permission must be set one by one)
“Without limiting”: It means the user can see all company type options

Integrated systems that currently support the user’s company type permission are: TIPTOP, WorkflowERP

8.2.3.1 View All Users’ Company Permission

Switch to “User Login Company” tab to view users’ company type permission settings. Please refer to the following numbers and instructions:



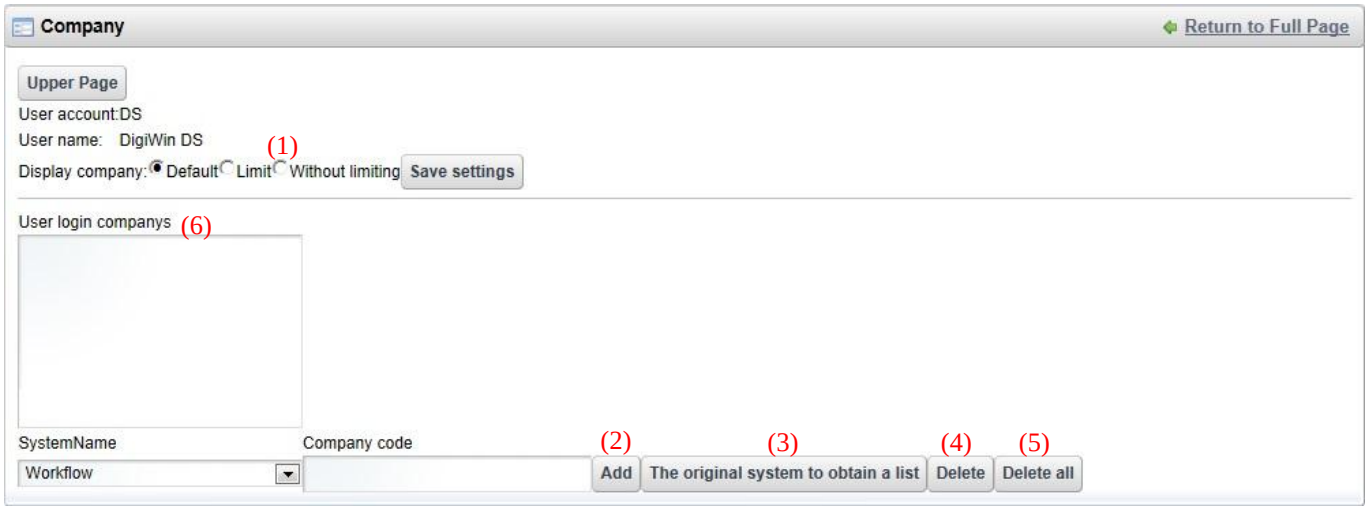
(1) Users have permission to log only shows the company:
- This setting is “Default company permission setting”. If a user’s company type permission is not set to limit or without limiting, this default permission will apply
- To change the setting, select the item (Limit / Without limiting) and then press “Save settings”

(2) Access to all users of the company:
Use the button to get from each integrated system the company type lists all users have the permission to access, and automatically save them to the list of “Company types accessible to users”

(3) All users’ company permission settings:
Display all users’ current company type permission settings ((Limit / Without limiting). The setting followed by “Default” in parentheses means the user’s company type permission is not set, so the default permission applies

8.2.3.2 Set a Single User’s Company Permission

Switch to “User Login Company” tab and click the information of the user to perform individual permission setting to access the user’s company type permission setting page. Please refer to the following numbers and instructions:



(1) Display company:
- This setting only belongs to the user’s personal setting. If the setting differs from “Default company permission setting” mentioned in the foregoing section, this personal setting will prevail
- By selecting “Default”, the user may directly apply the setting of “Default company permission setting”, instead of the personal setting

(2) Add:
- This function enables the user to add company type lists
- Operation method: Enter the item to be added in the “SystemName” and “Company code” and then click “Add”

(3) The original system to obtain a list:
- Get from the integrated system the company type list accessible to the user
- Operation method: In “SystemName” select the integrated system and press “The original system to obtain a list” to get back the data and automatically save them to the list of “User Login Companys”

(4) Delete:
In the list of “User Login Companys” select an item and press the button to remove the item

(5) Delete all:
Press the button to remove all items from the list of “User Login Companys”

(6) User Login Companys:
The list of company types accessible to the user

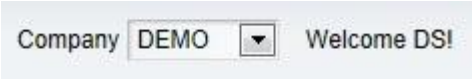
8.2.3.3 Recommended Setting Methods

Situation	Applicable setting method	
	Default permission	Individual permission
All users can access all company types	Set as “Without limiting”	Individual users require no specific permission setting (by default)
The majority of users can access all company types and only a few users are restricted to certain accessible company types (lower permission)	Set as “Without limiting”	Users with lower permission need to be set one by one as “Limit”, and a list of accessible company types should be designated
All users are restricted to certain accessible company types	Set as “Limit”	Individual users require no specific permission setting (by default), but a list of accessible company types should be designated for each user
All users are restricted to certain accessible company types, and only a few users require no restriction (i.e. accessible to all company types; higher permission)	Set as “Limit”	After performing the same setting, set users with higher permission one by one to “Without limiting”

8.2.4 Use of Company Menu

After setting company type lists, the company type list already set will appear on “Company” menu on the top right of Portal page.

Before performing the Single Sign On to a system that supports multi-company-type structure, be sure to select a correct “Company”.



8.2.5 Portlet Permission Setting

Click “Configuration” in the Portlet toolbar and then select the “Permission” to access the permission setting page.

Permission setting:

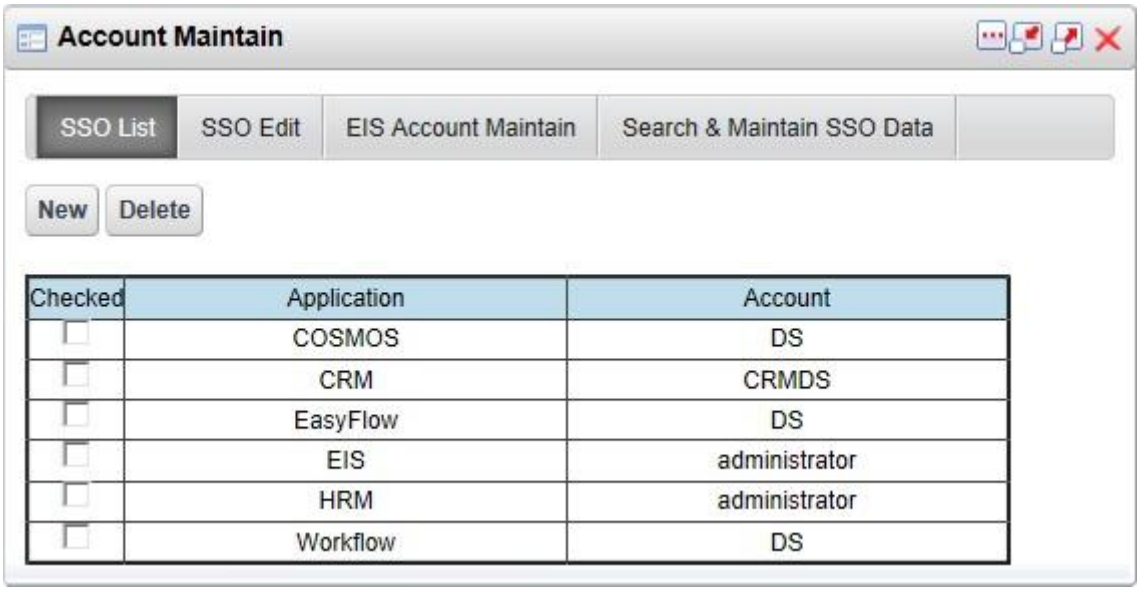
Data entity	Company Portlet
Permitted to	Access in Control Panel, Add to Page, View, Permissions, Configuration

8.3 Account Maintain

Before performing Single Sign On, the user needs to set the correspondence between his/her account in Portal and his/her account in other systems. This is called account maintain setting.

8.3.1 SSO List

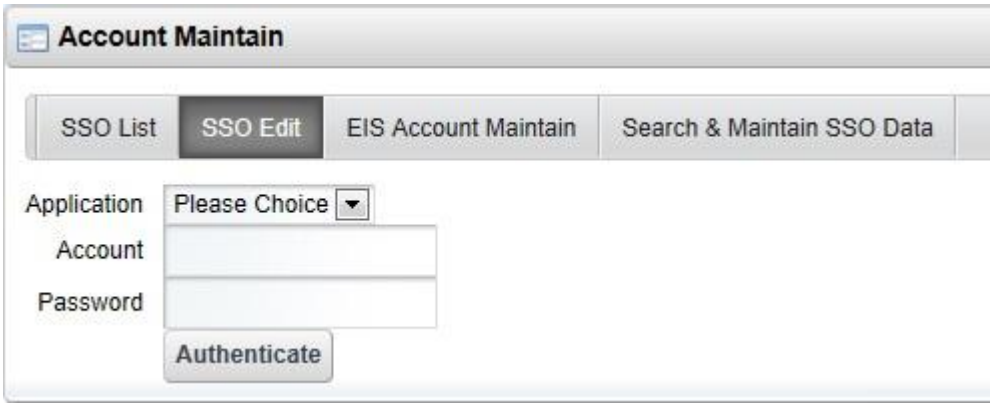
Click “SSO List” tab to display the list of the user’s current account correspondence with other systems. “Application” and “Account” in the list means the corresponded account of Portal user in the application system.



In the above figure: The corresponded account of Portal user in “CRM” system is “CRMDS”, and the same applies to other systems.

8.3.2 SSO Edit

To add a system account correspondence setting, on “SSO List” page click “Add”, or just click “SSO Edit” tab to access the account correspondence setting page. After entering related data, click “Authenticate”.



- Application: Select the system to be corresponded
- Account: Enter “Account” of the corresponded system
- Password: Enter “Password” of the corresponded system

Tips Account and password entered during account correspondence setting will be sent immediately to the selected “application” for validation. If such account and password are correct, account correspondence setting will be completed; otherwise, make sure whether the data entered are correct. For any question, please contact the system administrator.

8.3.3 Search SSO Data

Tips This function applies to system administrator only.

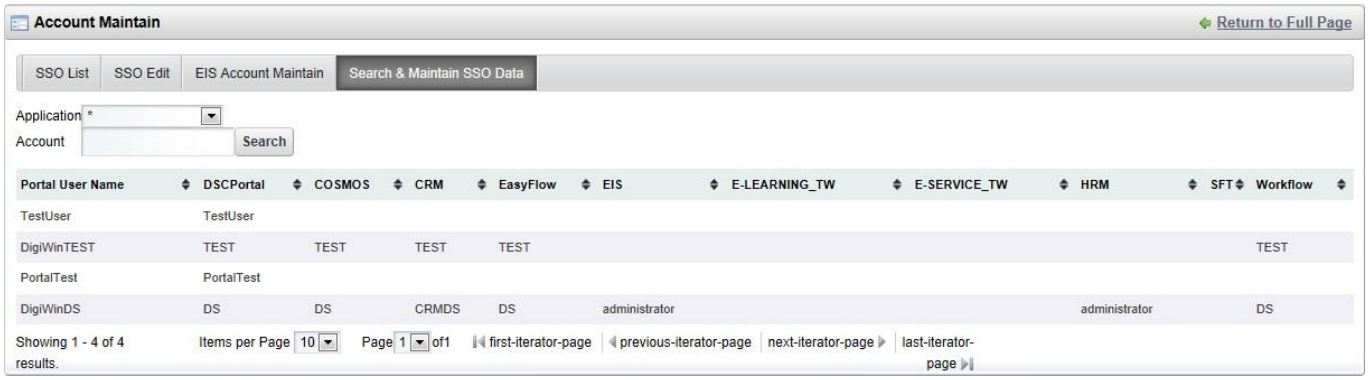
Click “Search & Maintain SSO Data” tab, enter query conditions and press “Search”. Results that meet the conditions will be listed below.

Search conditions available include:

- Application: Select the corresponded system to be queried, and * (asterisk) means there is no restriction
- Account: Enter corresponded account to be queried

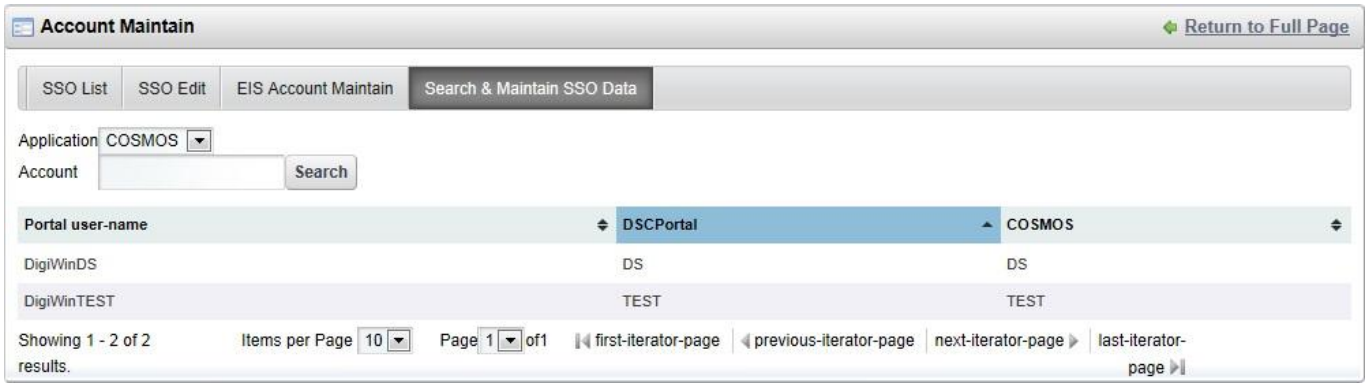
8.3.3.1 View All SSO Data

After setting query condition “Application” as * and leaving “Account” blank, all accounts of Portal and the corresponded account data in all systems will be listed.



8.3.3.2 View a Single System’s SSO Data

After selecting the system to be searched in query condition “Application” and leaving “Account” blank, the corresponded accounts of the system will be displayed.

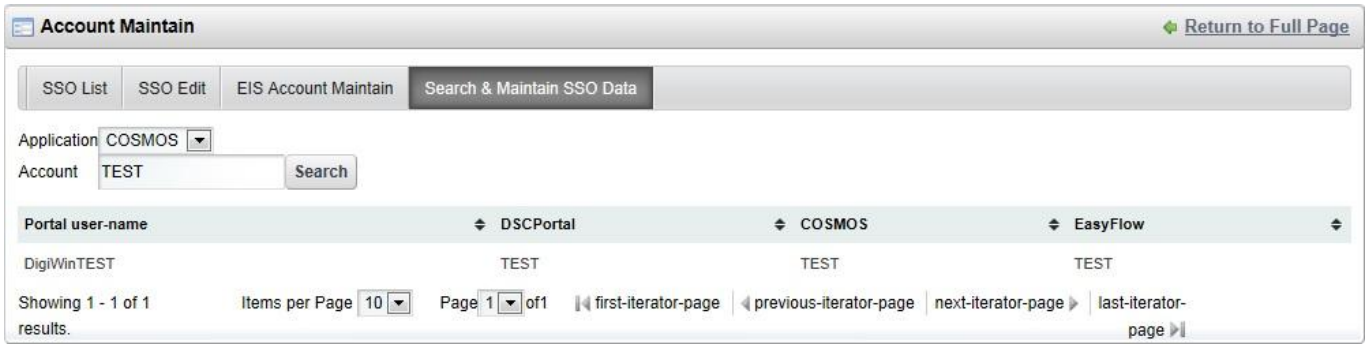


8.3.3.3 View SSO Data of a Designated Account

After selecting * for query condition "Application" and entering the account to be searched in "Account", all corresponded account data containing such account (regardless of system type) will be displayed.

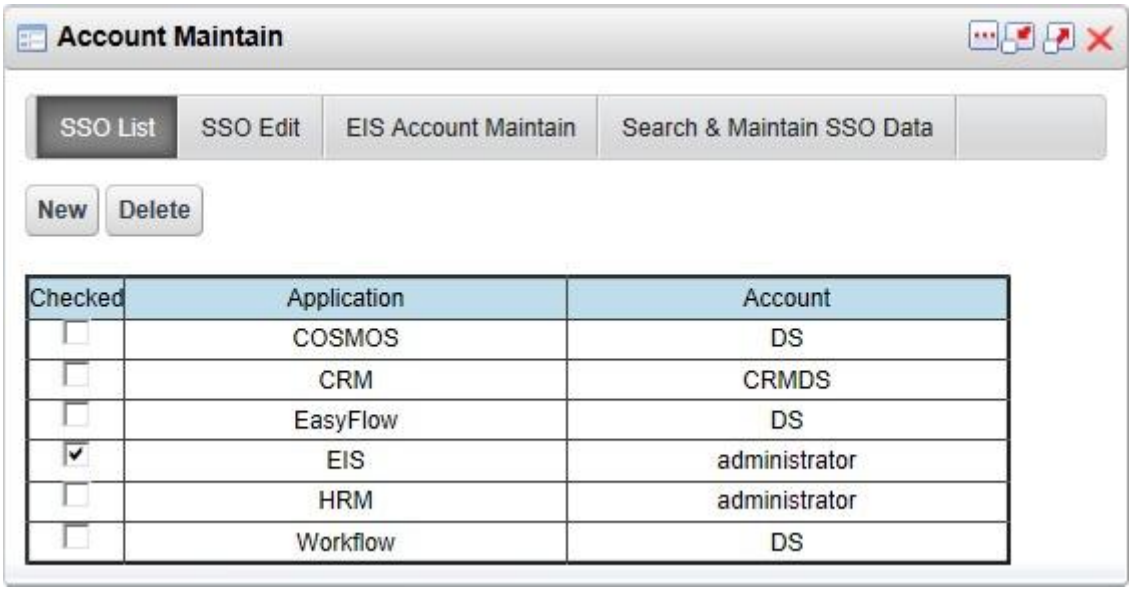
8.3.3.4 View SSO Data of a Designated System and Account

After selecting the system to be searched in query condition "Application" and entering the account to be searched in "Account", all corresponded account data containing such account in the system will be displayed.



8.3.4 Delete Account Maintain

Click "SSO List" tab, check the corresponded account data to be deleted and then click "Delete" to delete the corresponded account data.



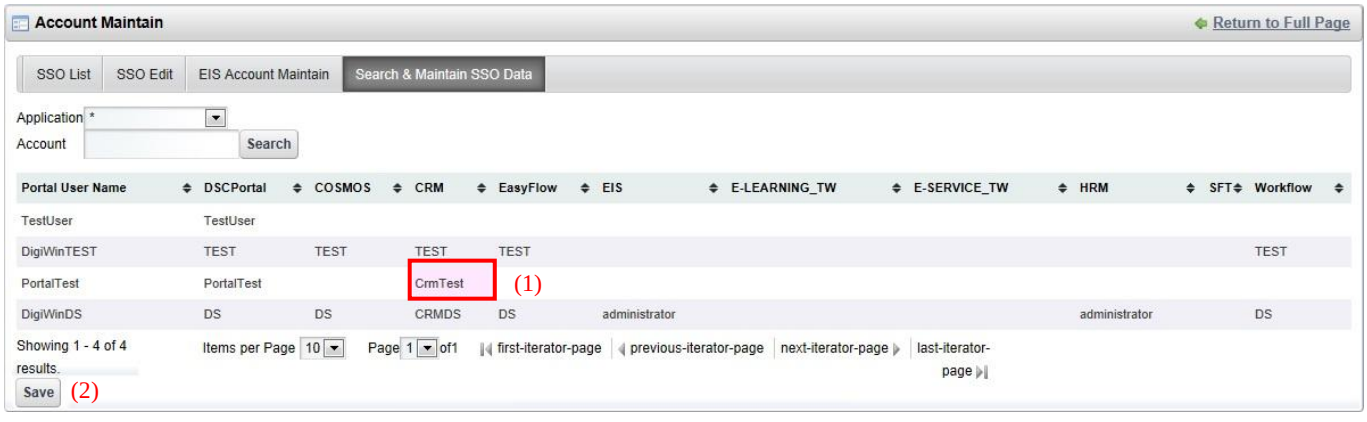
8.3.5 Reset Account Maintain

To reset SSO data, please delete the SSO data and then perform (New) account maintain setting.

8.3.6 Control SSO Data

Tips This function applies to system administrator only.

This feature enables the administrator to control corresponded account data of all users. Click “Search & Maintain SSO Data” tab and use the query function to search the corresponded account data to be edited. For setting method, refer to the following numbers and instructions:



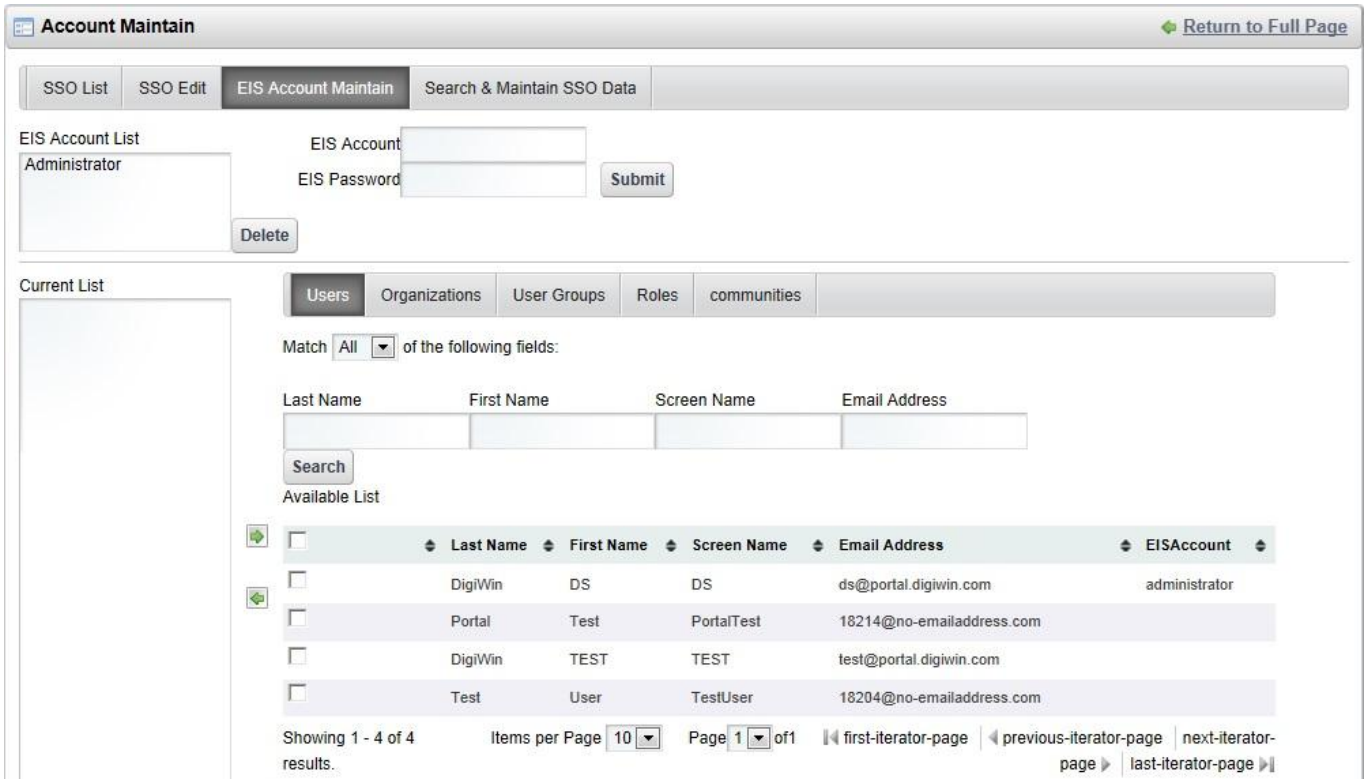
(1) On the table corresponding to the user and system type, left click to enter the corresponded account

(2) If a change is made to corresponded account, “Save” button will appear below. Be sure to save the change before leaving this page.

8.3.7 EIS Account Maintain

Tips This function applies to system administrator only.

This feature enables the administrator to set the account correspondence between EIS system and Portal system. Click “EIS Account Maintain” tab to access the EIS account correspondence setting view.

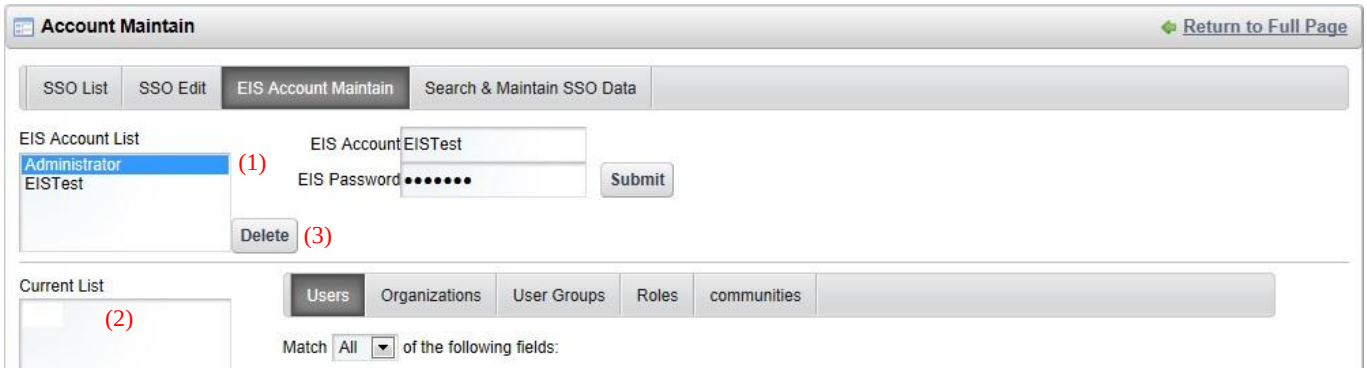


8.3.7.1 EIS Account Correspondence

Enter “EIS Account” and “EIS Password” and press “Submit” to add EIS account to “EIS Account List” on the left.

8.3.7.2 Delete EIS Corresponded Account Data

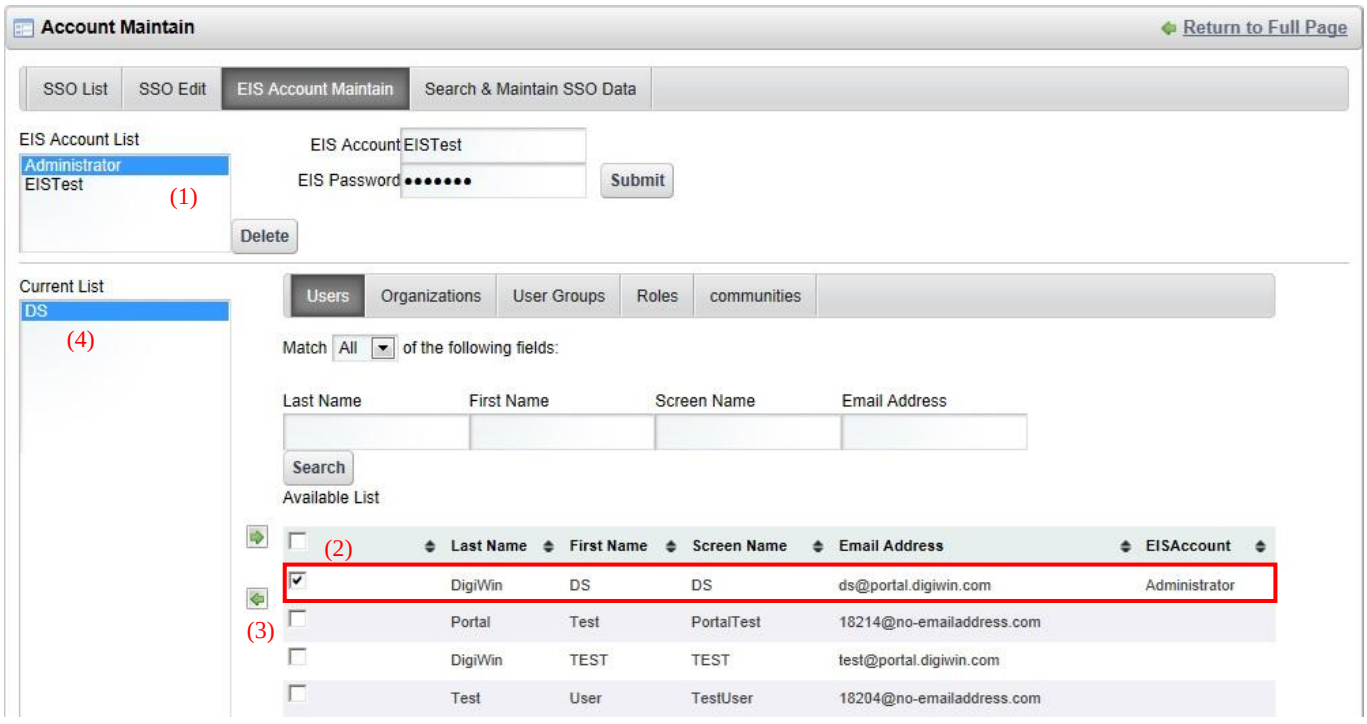
To delete EIS corresponded account data, refer to the following numbers and instructions:



(1) In "EIS Account List" select the account to be deleted
(2) If "Current List" has any item, remove such item before deleting the EIS account
(3) Click "Delete" to delete EIS account data

8.3.7.3 Create Account Maintain Between Portal and EIS Account

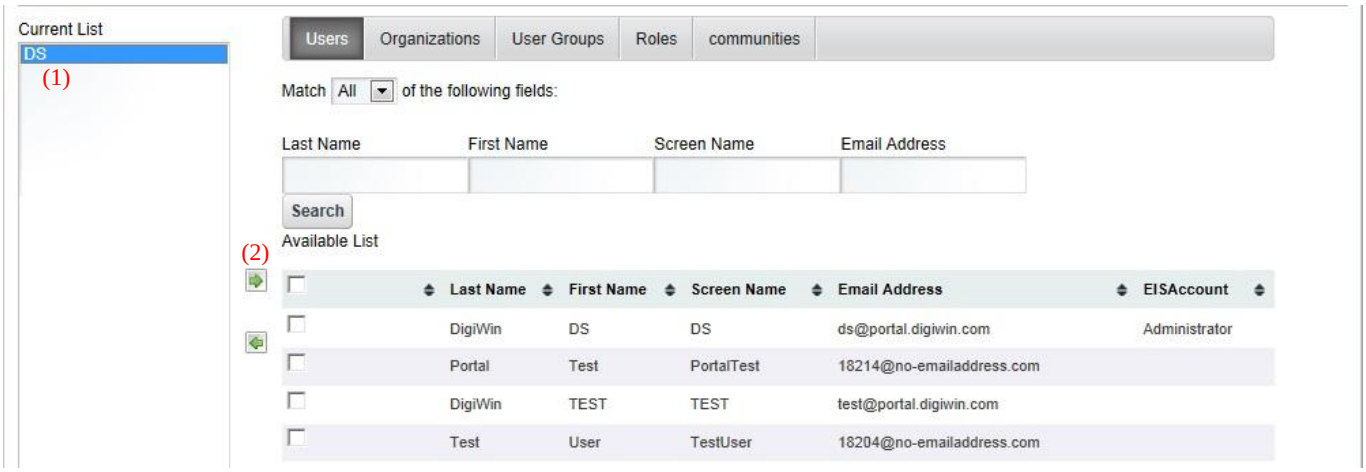
To set account correspondence between Portal and EIS account, refer to the following numbers and instructions:



(1) In "EIS Account List" select the EIS account where the account correspondence is to be set
(2) From Portal accounts displayed in "Available List" check the item to correspond to the selected EIS account
(3) After selection, press to add the selected item to the corresponded list
(4) After completing the setting, all the Portal accounts in "Existing corresponded account list" will correspond to the selected "EIS account"

8.3.7.4 Delete Account Maintain of Portal and EIS Account

In “Current List” select Portal account where the account correspondence is to be deleted and click .



8.3.8 Portlet Permission Setting

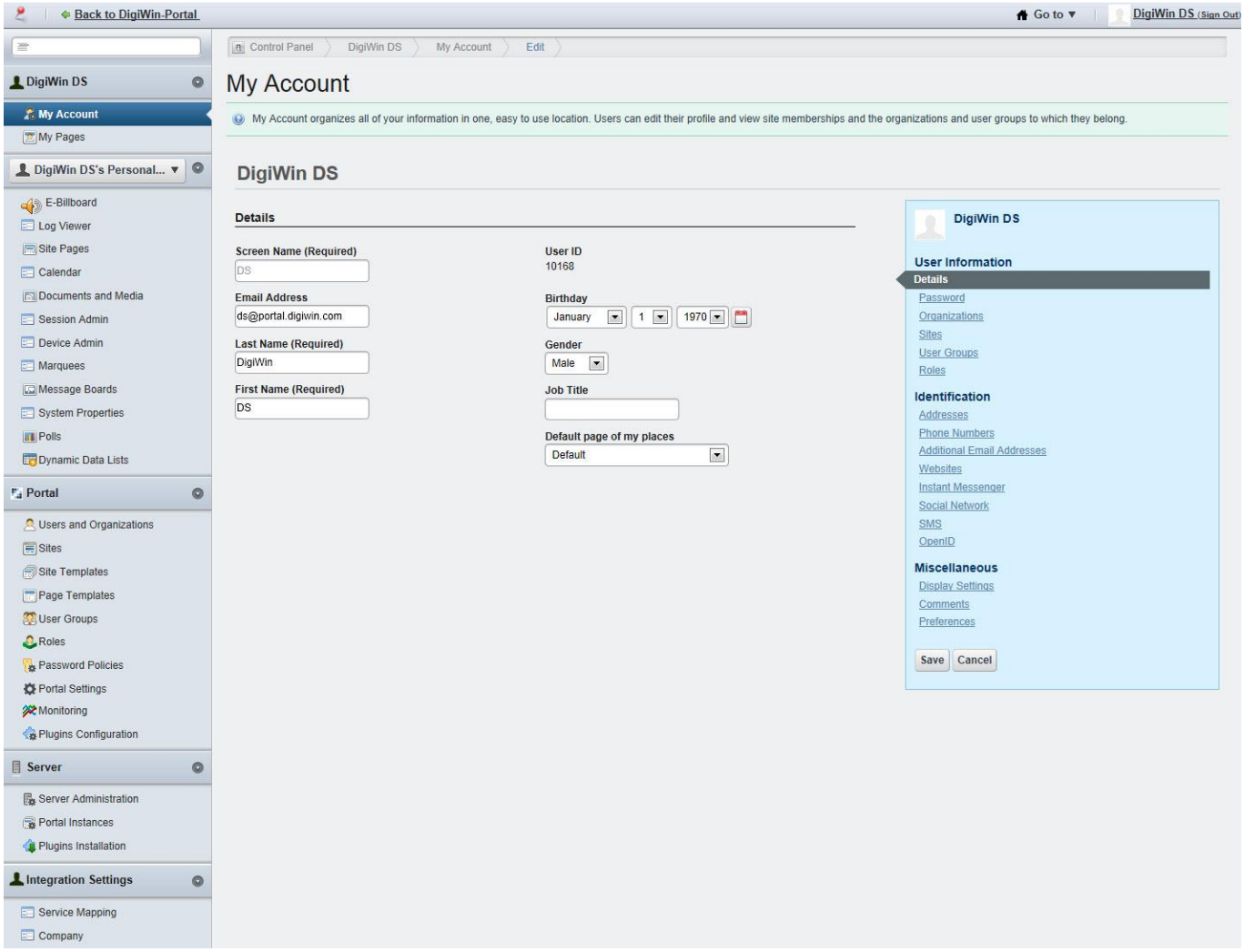
Click “Configuration” in the Portlet toolbar and then select the “Permissions” to access the permission setting page.

Permission setting:

Data entity	Account Maintain Portlet
Permitted to	Add to Page, View, Permissions, Configuration

9. Control Panel

Control panel is a central management interface that enables the user to perform system-related settings. Click “Go to” on the top menu bar and then press “Control Panel” to access this management interface. Please click the items to be set on the left menu.



Manageable items in the control panel depend on the role of the user:

Ordinary role	Manageable items
User	My account, community (not available if the user has not joined any community)
Power User	My account, my pages, community (not available if the user has not joined any community)
Administrator	All items

The following is the description of management items in the control panel.

9.1 User Account

9.1.1 My Account

Please refer to “My Account” section in “DigiWin Portal Operating Instructions”.

9.1.2 My Pages

This feature enables the user to manage his/her own pages, which fall into “Public Pages” and “Private pages”.
For page management method, please refer to “Management page” section in “Start using DigiWin Portal”.

9.2 Content

9.2.1 Site Settings

Please refer to “Sites” section in “Portal Basic Setting”.

9.2.2 E-Billboard

Please refer to “E-Billboard” section in “System Management”.

9.2.3 Log Viewer

Please refer to “Log Viewer” section in “System Management”.

9.2.4 Site Pages

Please refer to “Management Page” section in “Start Using DigiWin Portal”.

9.2.5 Site Memberahips

Please refer to “Sites” section in “Portal Basic Setting”.

9.2.6 Documents and Media

Please refer to “Documents and Media” section in “Content Management”.

9.2.7 Documents and Media Display

Please refer to “Documents and Media Display” section in “Content Management”.

9.2.8 Calendar

Please refer to “Calendar” section in “Individual Assistant”.

9.2.9 Message Boards

Please refer to “Message Boards” section in “Collaboration”.

9.2.10 Polls

Please refer to “Polls Managements” section in “Collaboration”.

9.2.11 Session Admin

Please refer to “Session Admin” section in “Conference Management”.

9.2.12 Device Admin

Please refer to “Device Resource Admin” section in “Conference management”.

9.2.13 Marquees

Please refer to “Marquees” section in “Collaboration”.

9.2.14 System Properties

Please refer to “System Properties” in “System management”.

9.2.15 Dynamic Data Lists

Please refer to “Dynamic Data List Display” in “Collaboration”.

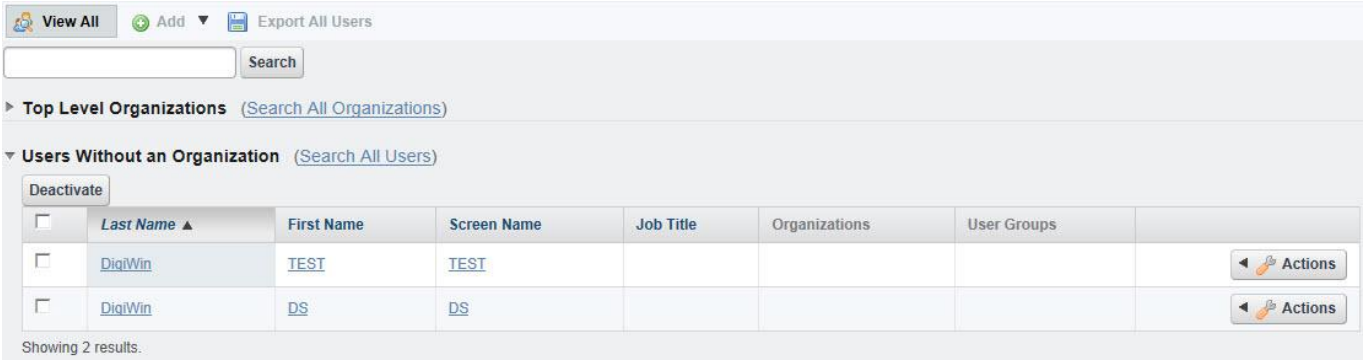
9.3 Portal Basic Setting

9.3.1 User and Organizations ----User

9.3.1.1 View User List

Click “View all” to view all created user account list (Cancelled accounts and users already included in

organization will not be displayed).



9.3.1.2 Search User

Two search methods are available: Basic search, advanced search. Please click the link below "Search" button to switch search methods.

(1) Basic search:

Enter the keyword of last name,first name, or screen name in search field and then click "Search". Results that meet the conditions will be listed below.

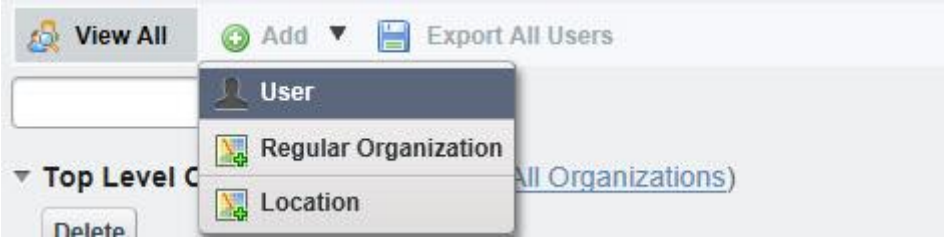
(2) Advanced search:

Enter query conditions and click "Search", and the results that meet such conditions will be displayed below. Search conditions available include:

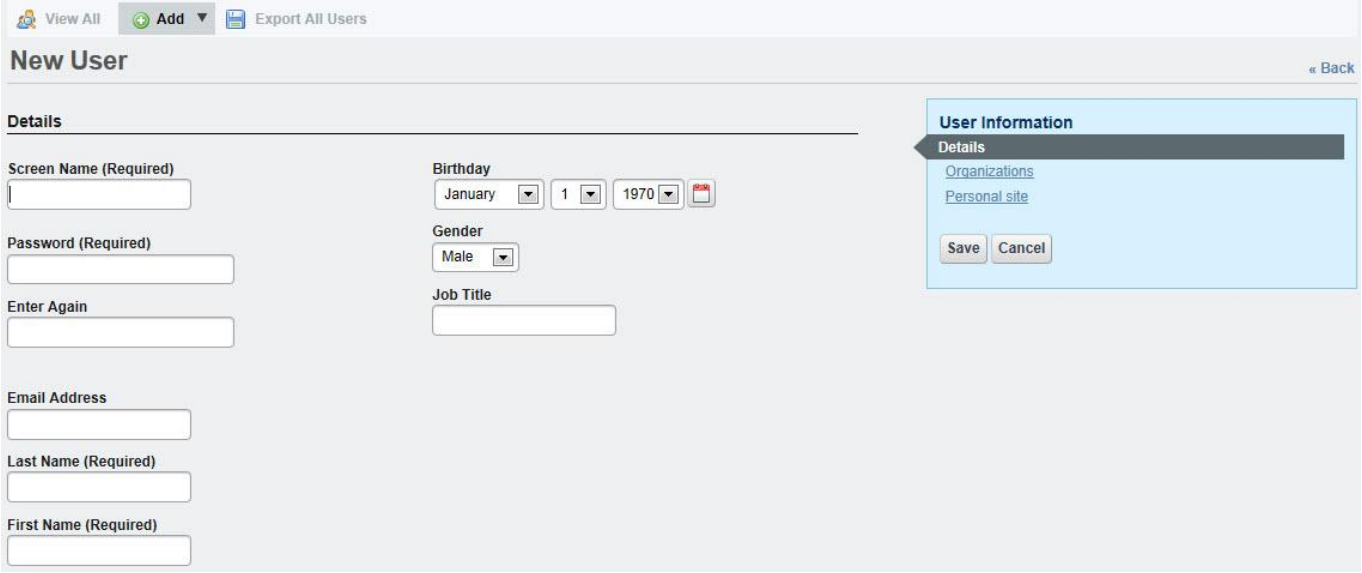
- Logic operation: Select logic operation method (All/Any) between search conditions. Select "All" if all conditions must be met; select "Any" if at least one condition must be met
- Last Name: Enter the last name of the user to be searched
- Middle Name: Enter the middle name of the user to be searched
- First Name: Enter the first name of the user to be searched
- Screen Name: Enter the screen name of the user to be searched
- E-mail Address: Enter the E-mail of the user to be searched
- Status: Select the account activation status of the user to be searched (any status/active/inactive)

9.3.1.3 Add User

On the top of the user page press “Add” and then click “User” to open the add user page.



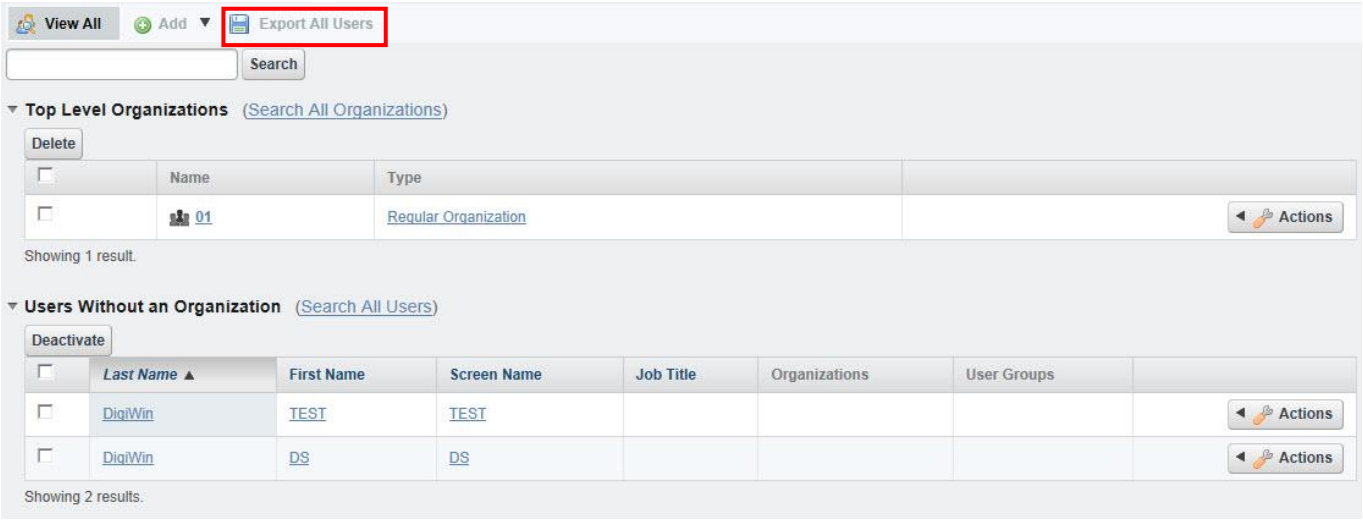
After entering related data, click “Save”.



- Screen Name: Enter the user’s login account.
  Account may only include the following halfwidth characters: English letters, figures (0~9), underline(_), hyphen (-), decimal point (.)
- Password: Enter the user’s login password
- Enter Again: Enter again the password
- E-mail address: Enter the user’s main E-mail. Do not enter the E-mail already created for another user
- Last Name: Enter the last name of the user
- First name: Enter the first name of the user
- Birthday: Enter the date of birth of the user
- Gender: Select the sex (male/female) of the user
- Job Title: Enter the job title of the user

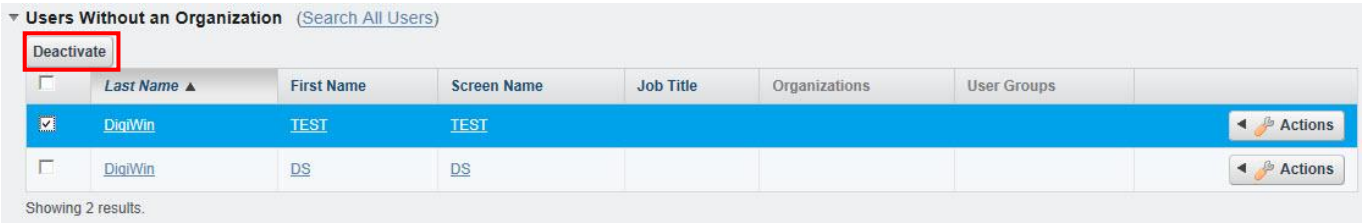
9.3.1.4 Export User List

On the top of the user page click “Export all users” to export user data (in csv format).

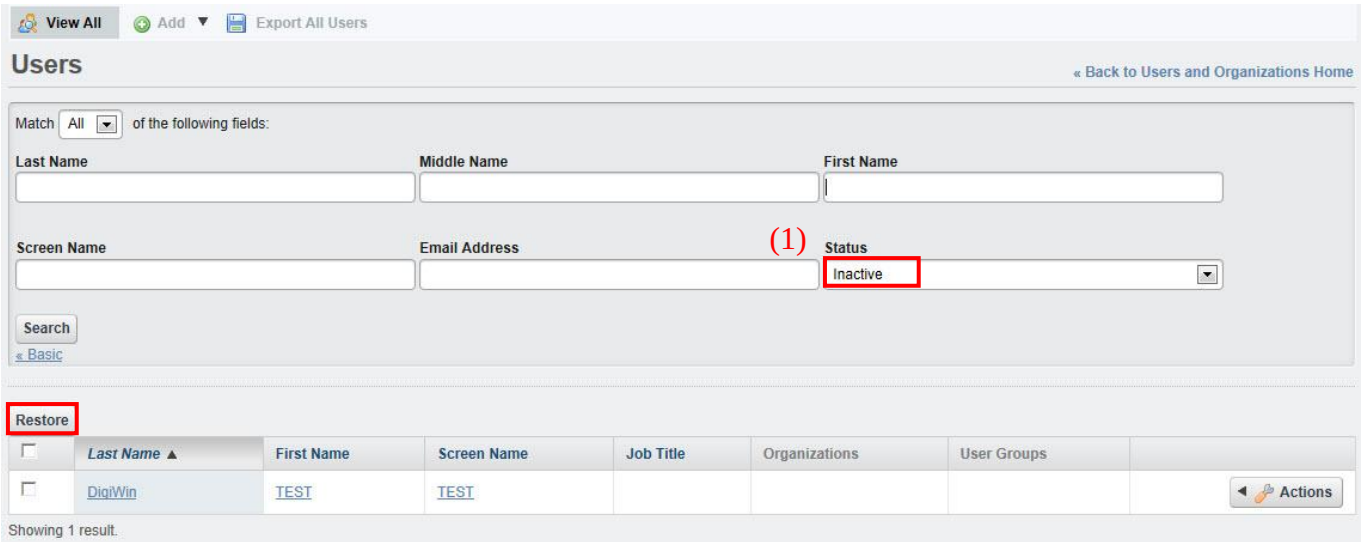


9.3.1.5 Deactivate and Restore User Account

- Deactivate user account: In “User” data entry check the account to be cancelled and click “Deactivate”. The cancelled user cannot log in Portal until the account is restored.



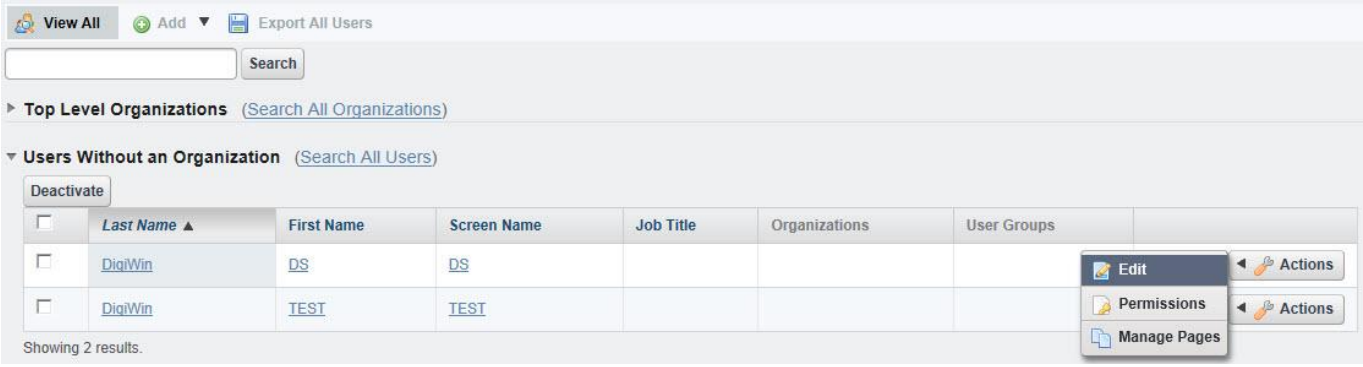
- Restore user account: Switch to advanced search and change “Status” condition to “inactive” to search out the deactivated account. Check the account to be restored and click “Restore”. The restored user can continue to use Portal.



9.3.1.6 Edit User Data

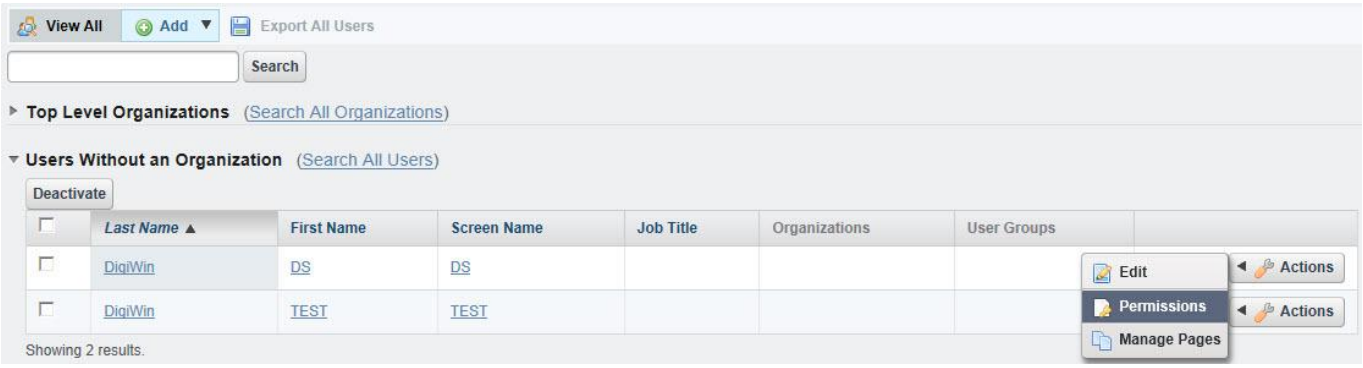
Click “Actions” on the right of “User” data entry and then select “Edit” to access edit page.

For user data, please refer to “My Account” section in “Start using DigiWin Portal”.



9.3.1.7 Set User Data Permission

Click “Actions” on the right of “User” data entry and then select “Permissions” to access the user’s data permission setting page.



For permission setting, please refer to “Permission Setting Method” section in “Start using DigiWin Portal”.

Permission setting:

Data entity	User
Permitted to	Delete, impersonate, permissions, update, view

9.3.1.8 Manage User Page

Click “Actions” on the right of “User” data entry and then select “Manage pages” for open page management of users.

For page management method, please refer to “Management page” section in “Start using DigiWin Portal”.

9.3.1.9 Impersonate the User

Click “Actions” on the right of “User” data entry and then select “Impersonate user” to impersonate the

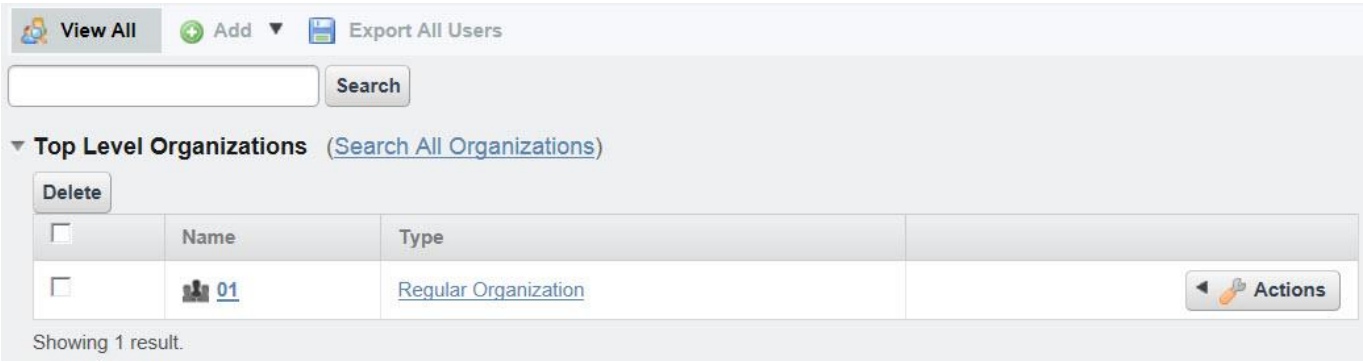
user's permission in Portal.

To stop impersonation, click "Be yourself again".

9.3.2 User and Organizations --- Organization

9.3.2.1 View Organization List

Press "View all" to view all created organization lists.



9.3.2.2 Search Organization

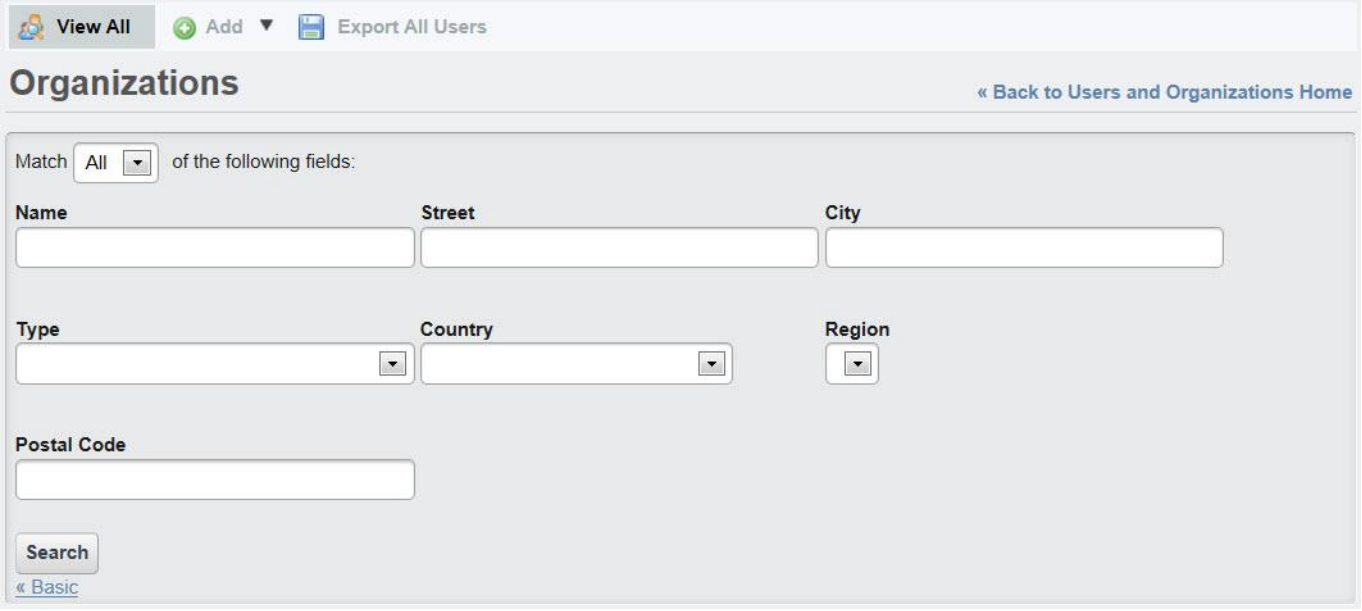
Two search methods are available: Basic search, advanced search. Please click the link below "Search" button to switch search methods.

(1) Basic search:

Enter the keyword of organization name in the search field and then press “Search”, and results that meet the conditions will be listed below.

(2) Advanced search:

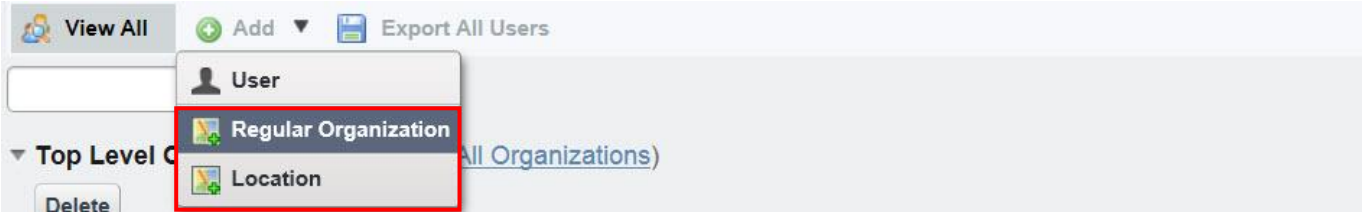
Enter query conditions and click “Search”, and the results that meet such conditions will be displayed below. Search conditions available include:



- Logic operation: Select logic operation method (All/Any) between search conditions. Select “All” if all conditions must be met; select “Any” if at least one condition must be met
- Name: Enter the name of the organization to be searched
- Street: Enter the street of the organization to be searched
- City: Enter the city of the organization to be searched
- Type: Select the type (regular organization/location) of the organization to be searched
- Country: Enter country type of the organization to be searched
- Region: Select the region of the organization to be searched
- Postal code: Enter the postal code of the organization to be searched

9.3.2.3 Add Organization

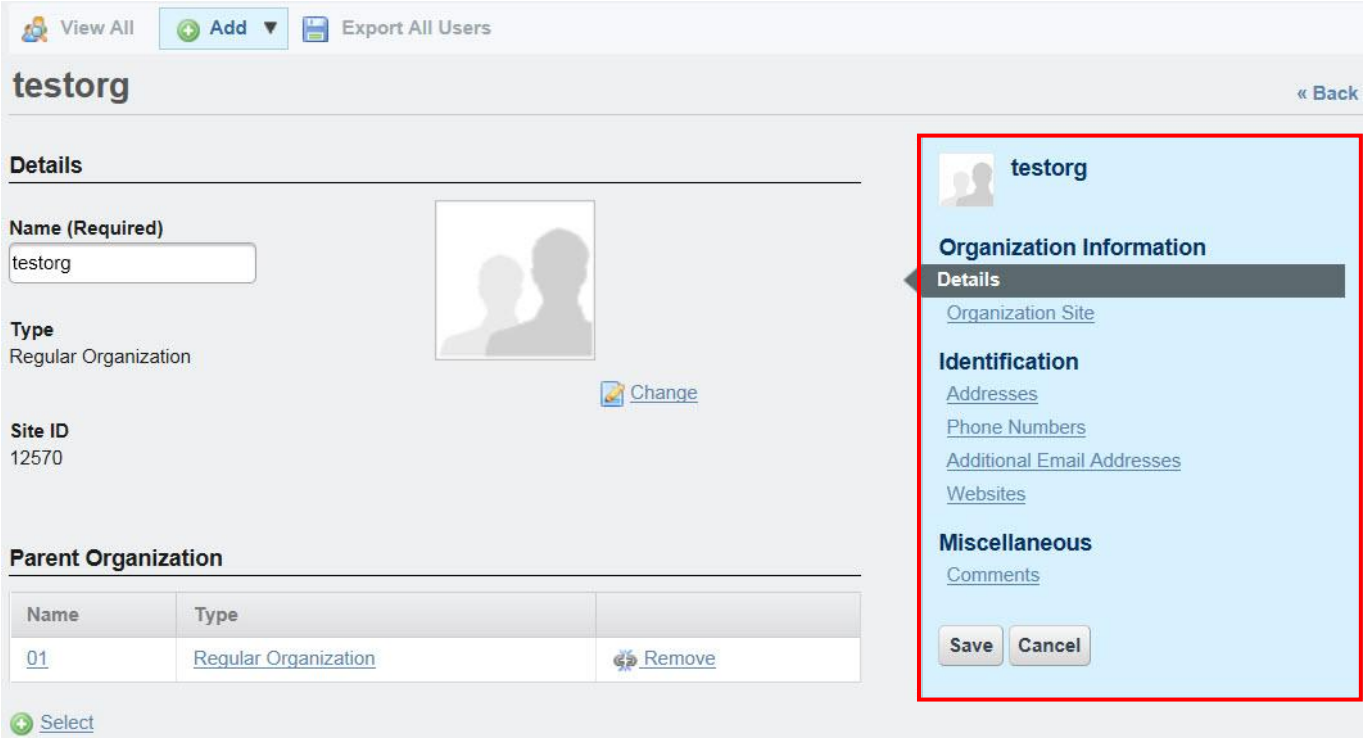
On the top of organization page click “Add” and then click “Regular Organization/Location”to open the add organization page.



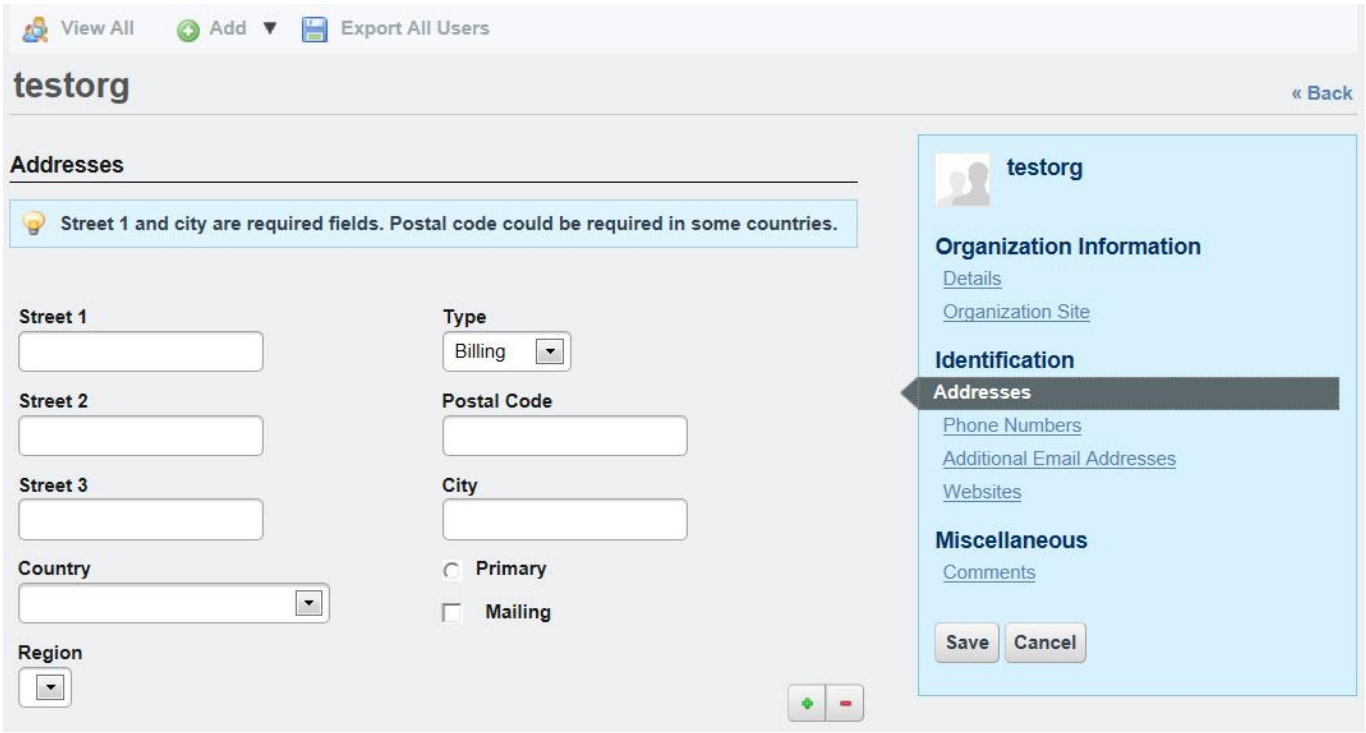
After entering related data, click “Save”.

- Name: Enter the name of the organization
- Type: Select the type of the organization (regular organization/location)
- Parent Organization: Set the upper-level organization where this organization is affiliated. Press “Select” below to set the parent organization, and only the “regular organization” can be selected as upper-level organization

After the setting is saved, the menu on the right will display other data of the organization for further setting.



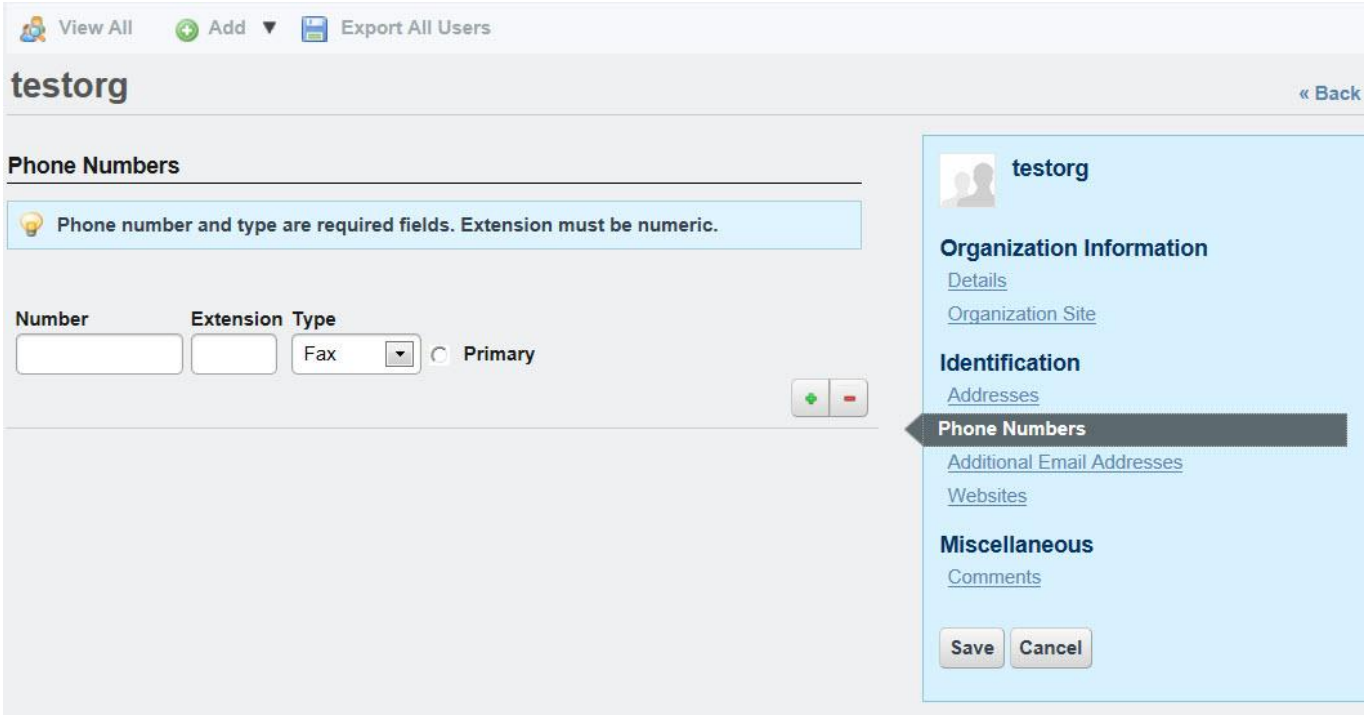
- Addresses: Enter the organization's address data. Click to add more data and click to delete data.



- Country, postal code, city, street 1, street 2, street 3: Enter the address
- Type: Select address type (Billing/Other/P.O. Box/Shipping)
- Primary: Check it for the main address (at most one primary address)
- Mailing: Check it for the mailing address (optional)

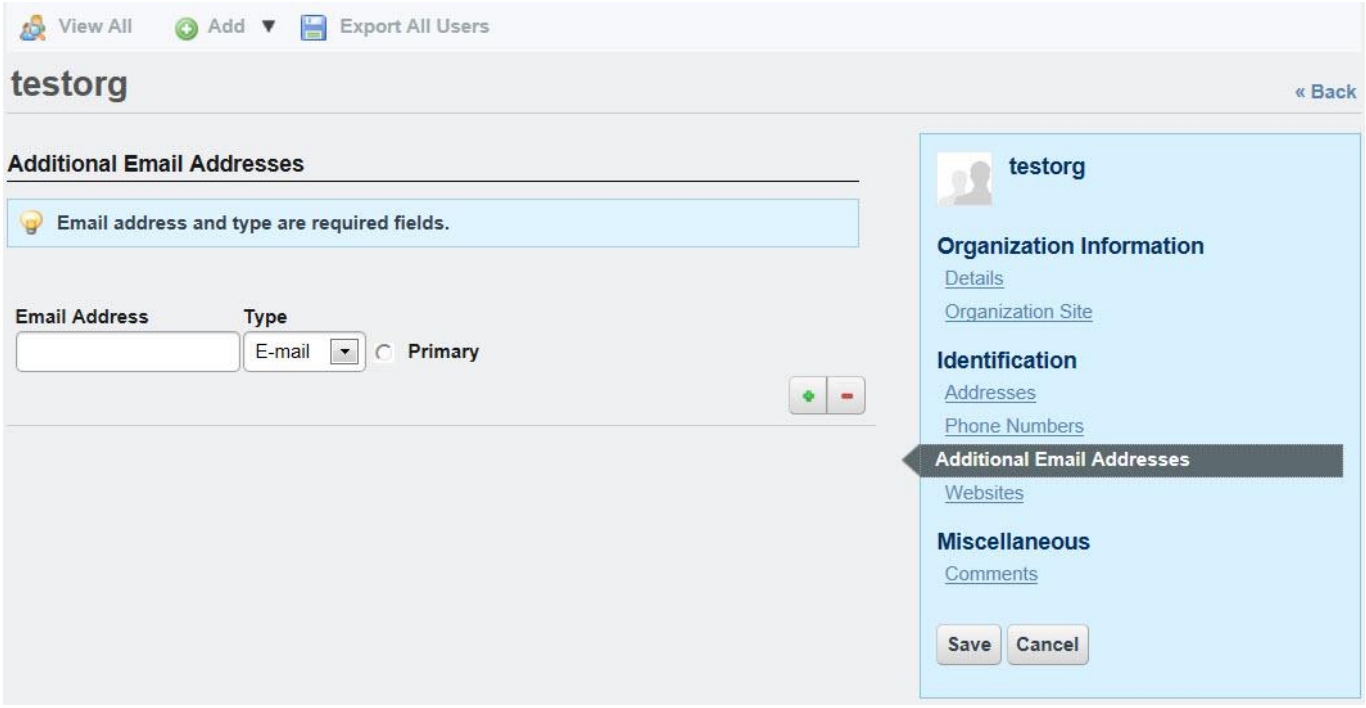
- Region: Select the region of the organization

- Phone Numbers : Enter the organization's telephone number data. Click to add more data and click to delete data.



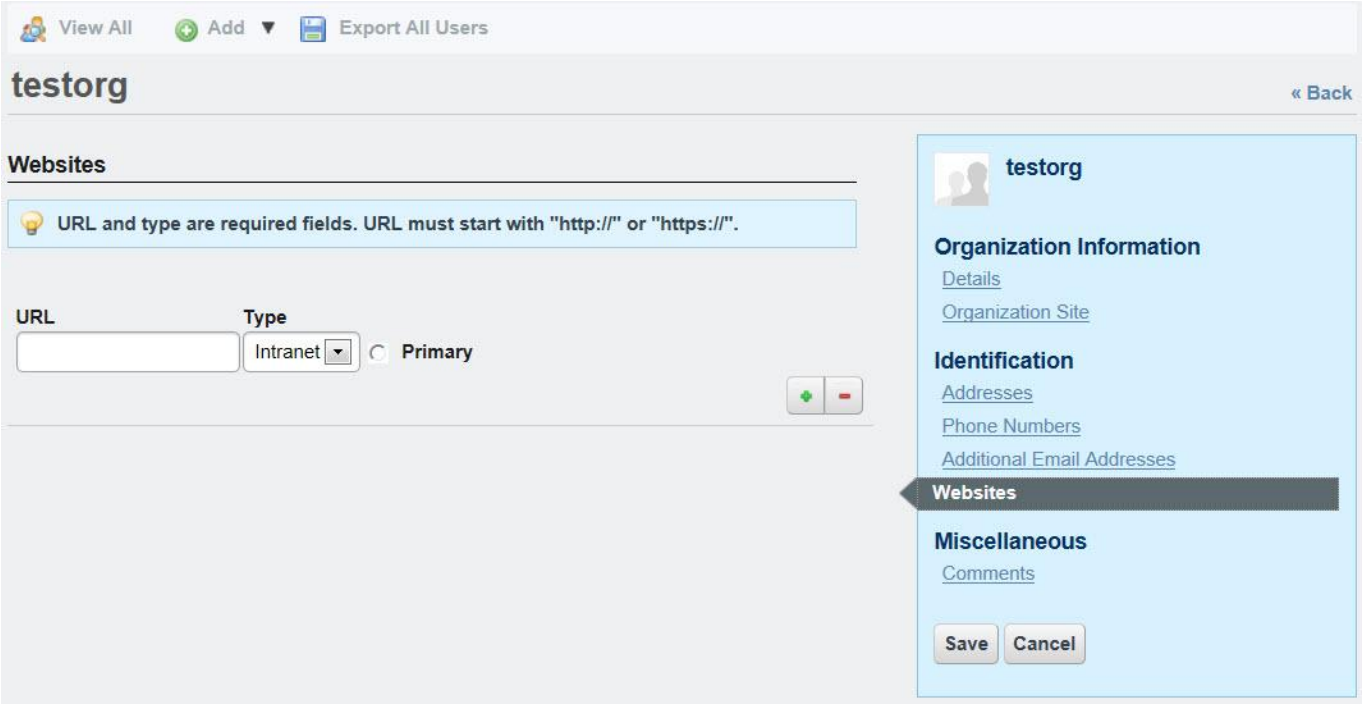
- Number and Extension: Enter telephone number data
- Type: Select the type of telephone number (Fax/Local/Other/Toll-Free/TTY)
- Primary: Check it for the main telephone number (at most one main telephone number)

- Additional Email Addresses: Enter the organization's E-mail data. Click to add more data and click to delete data.



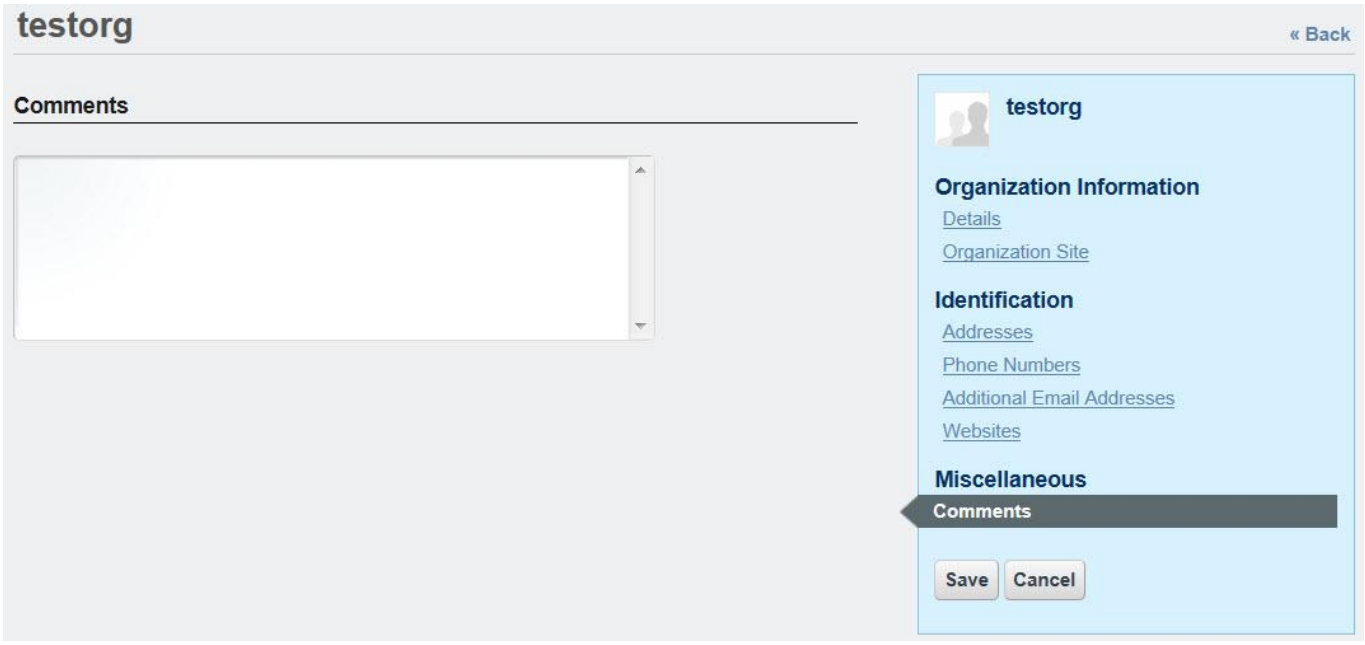
  - Email Address: Enter E-mail address
  - Type: Select E-mail type (E-mail/E-mail 2/E-mail 3)
  - Primary: Check it for the primary E-mail (at most one primary E-mail)

- Websites: Enter the organization's website data. Click to add more data and click to delete data.



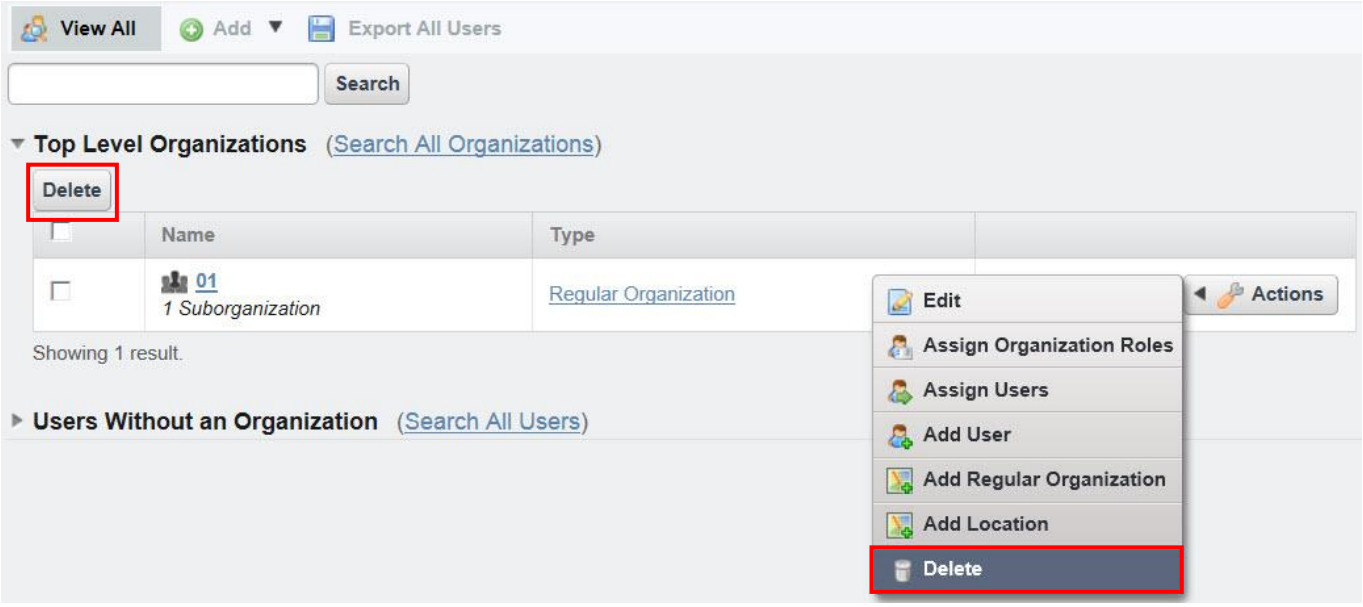
- URL: Enter the website's URL
- Type: Select website type (Intranet/Public)
- Primary: Check it for the Primary website (at most one Primary website)

- Comments: Enter the comment on the organization.



9.3.2.4 Delete Organization

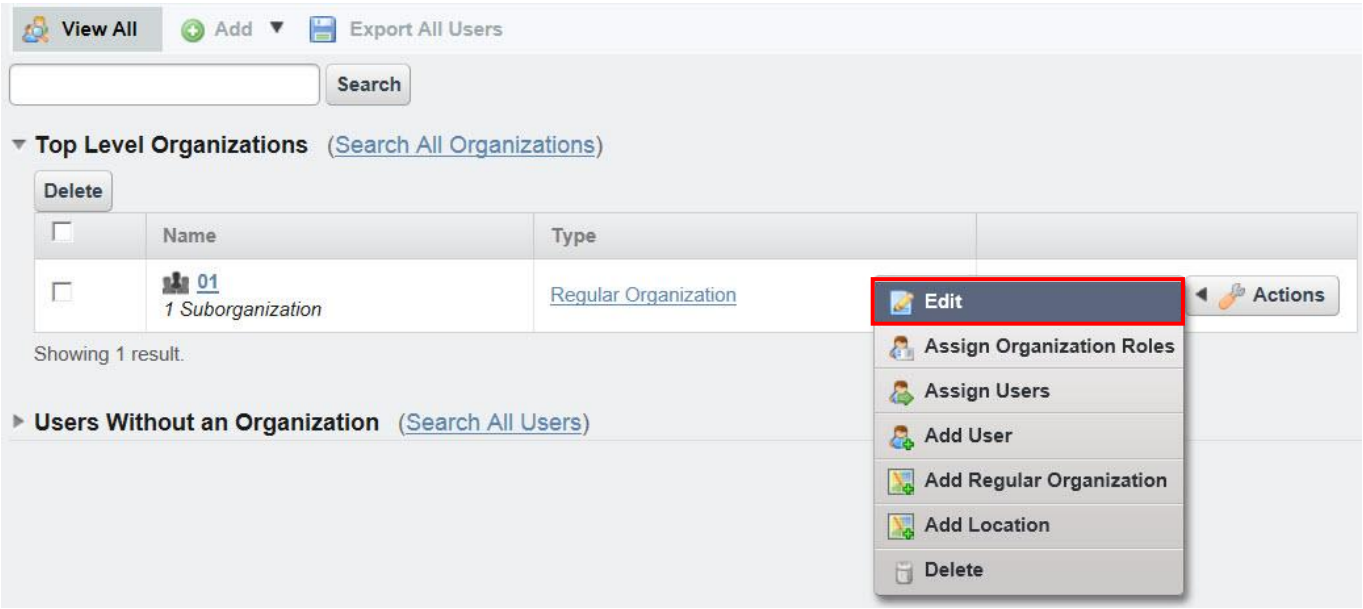
In “Organization” data entry check the data to be deleted and click “Delete” , or click “Actions” on the right of the organization to be deleted and then click “Delete”.



Tips If the organization to be deleted has designated members, your request would fail to complete.

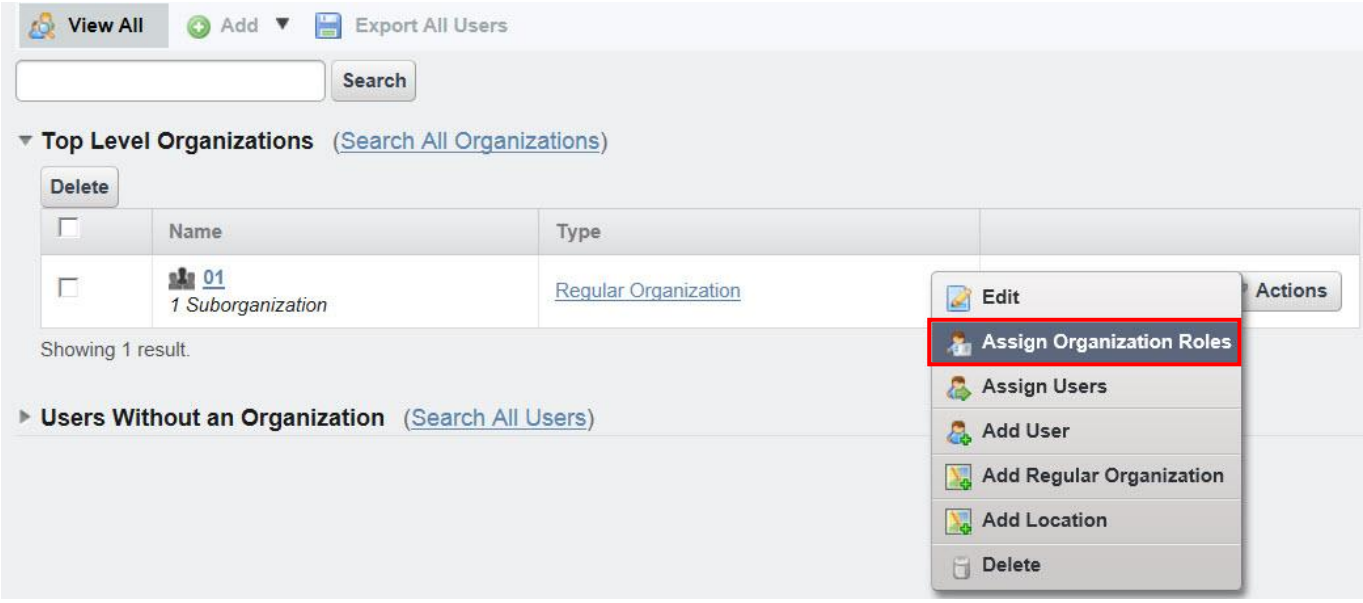
9.3.2.5 Edit Organization Data

Click “Actions” on the right of “Organization” data entry and then select “Edit” to access edit page. For organization data, please refer to the foregoing “Add organization” section.



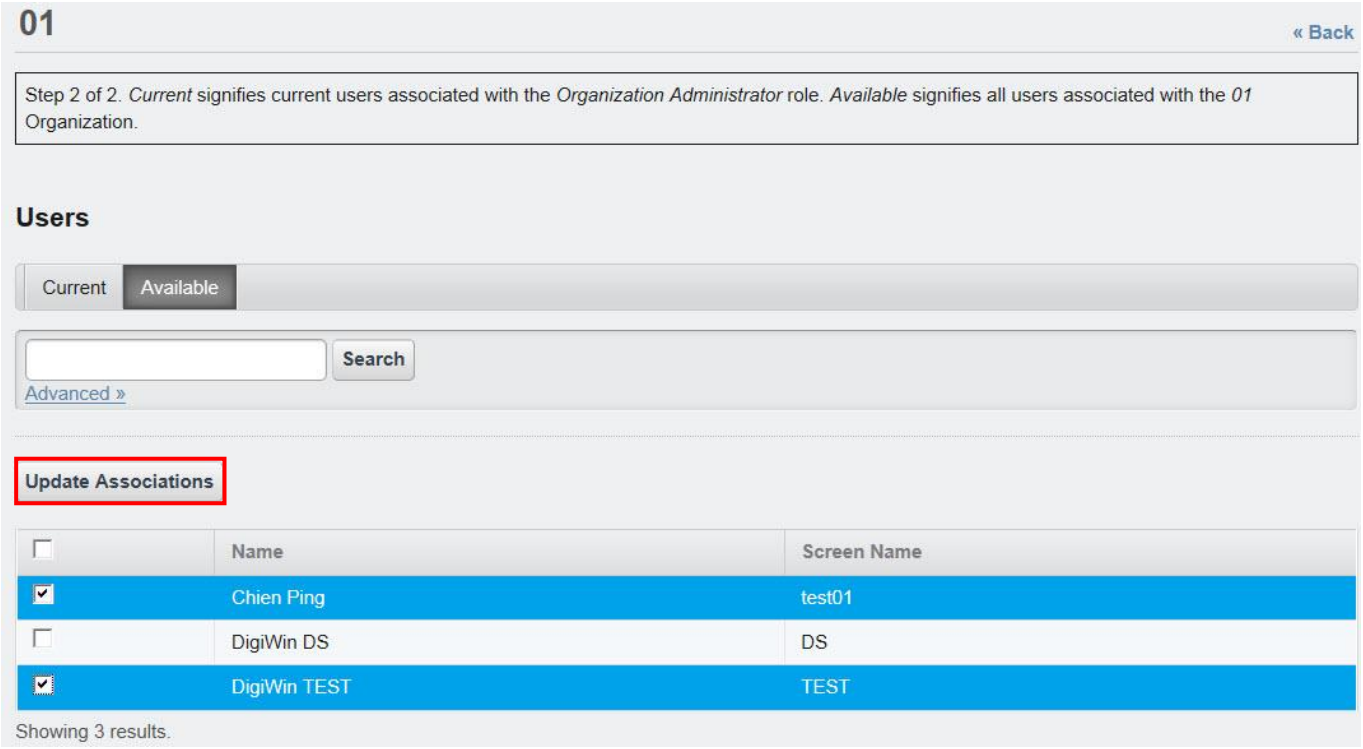
9.3.2.6 Designate Organization Role

Click “Actions” on the right of “Organization” data entry and then select “Assign Organization Roles” to assign roles to the users of the organization.



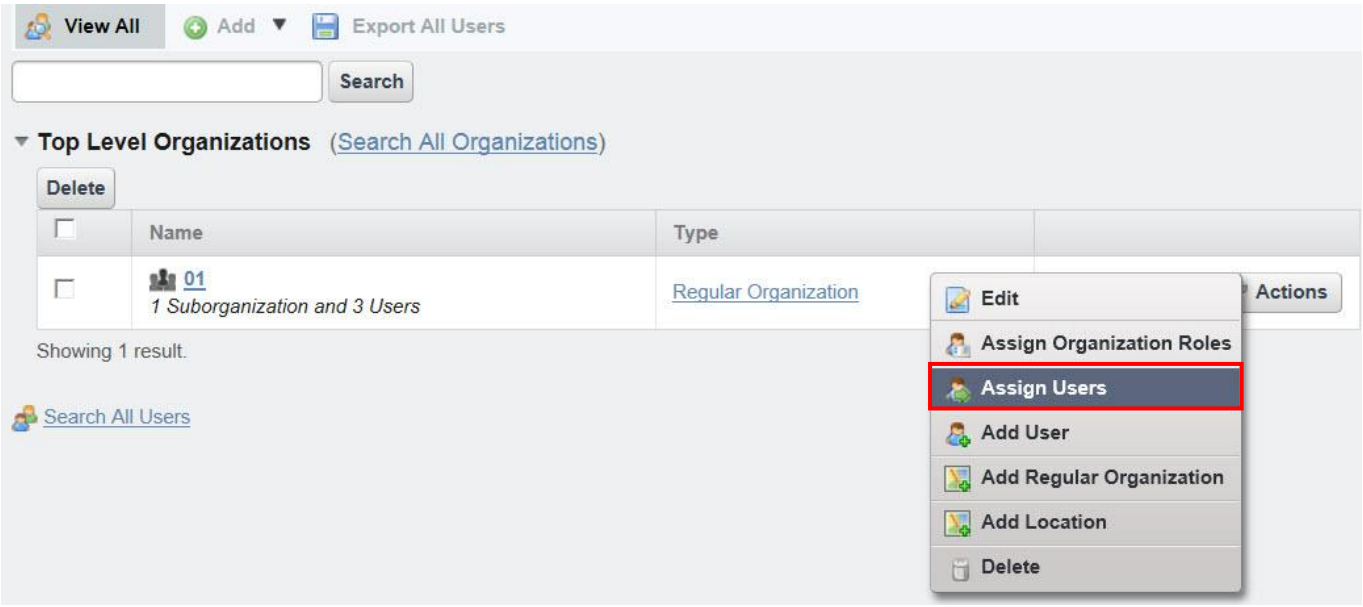
After accessing the setting page, select the role to be set,

check the user, and press “Refresh association”.

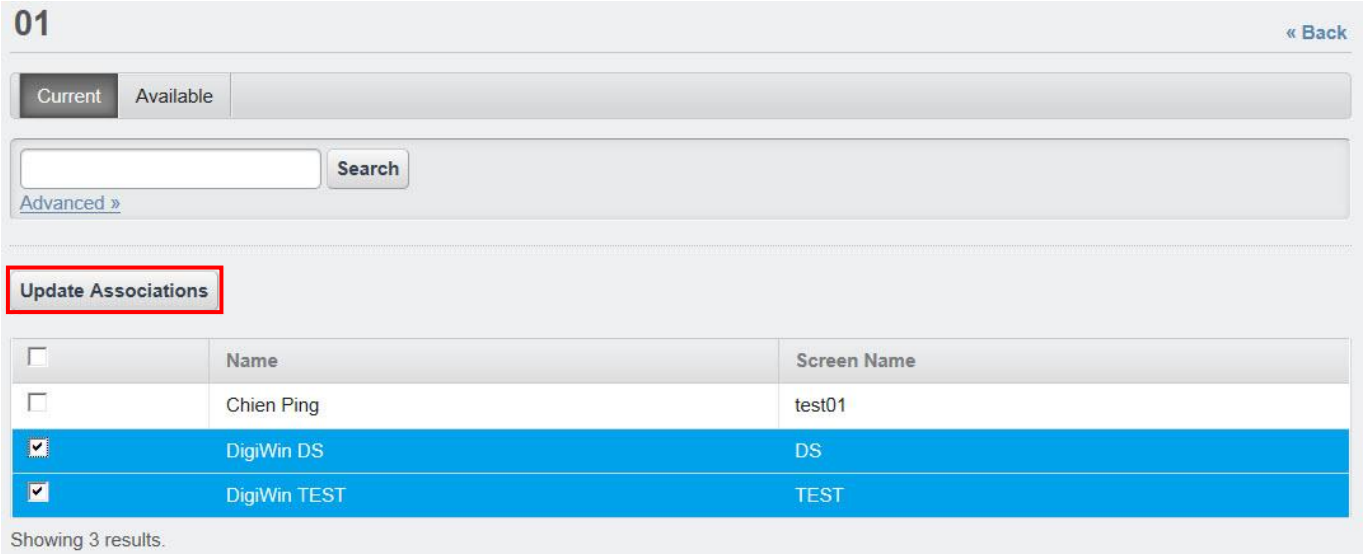


9.3.2.7 Designate Organization Member

Click “Actions” on the right of “Organization” data entry and then select “Assign Users” to designate members for the organization.

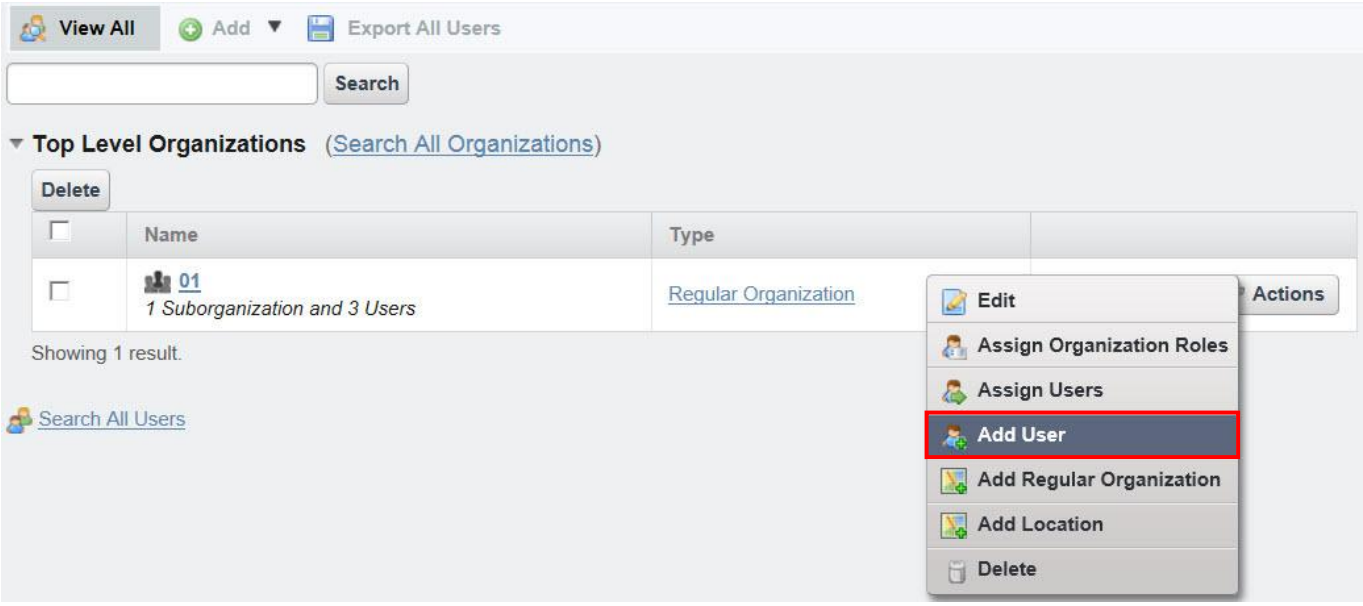


After accessing the setting page, check the users designated for this organization and press “Update Associations”.



9.3.2.8 Add Organization User

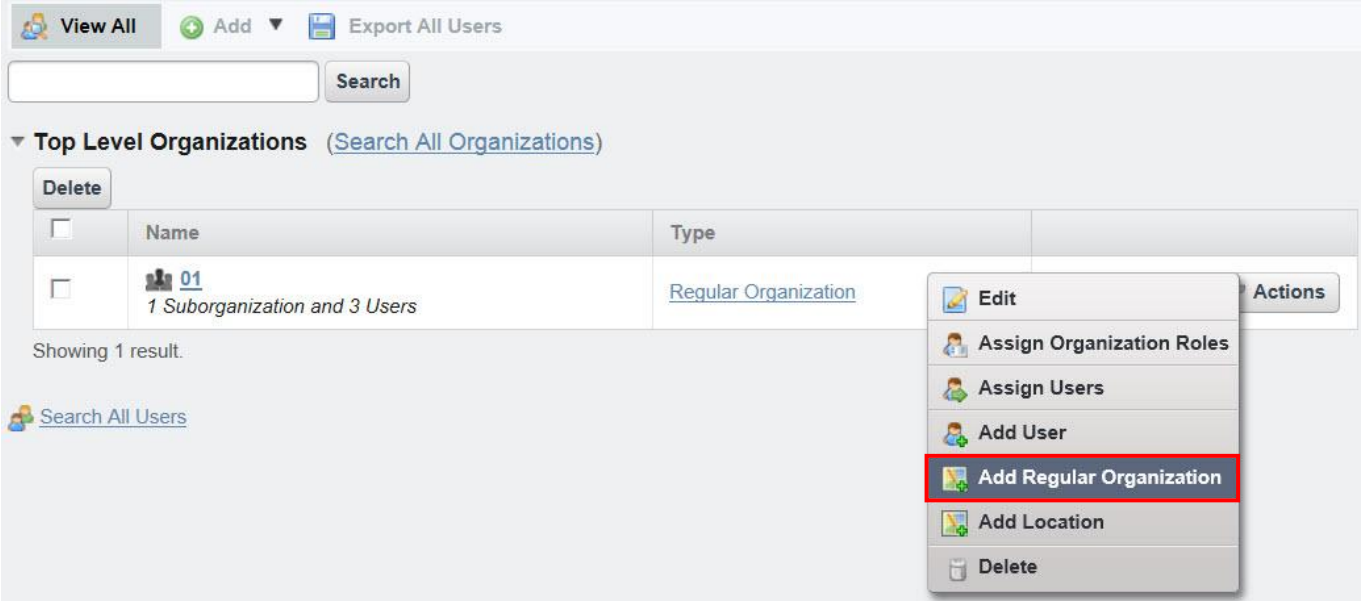
Click “Actions” on the right of “Organization” data entry and then select “Add user” to add a user account while at the same time designating the new account as the member of the organization.



For account addition method, please refer to the foregoing “Add User” section.

9.3.2.9 Add Ordinary Organization

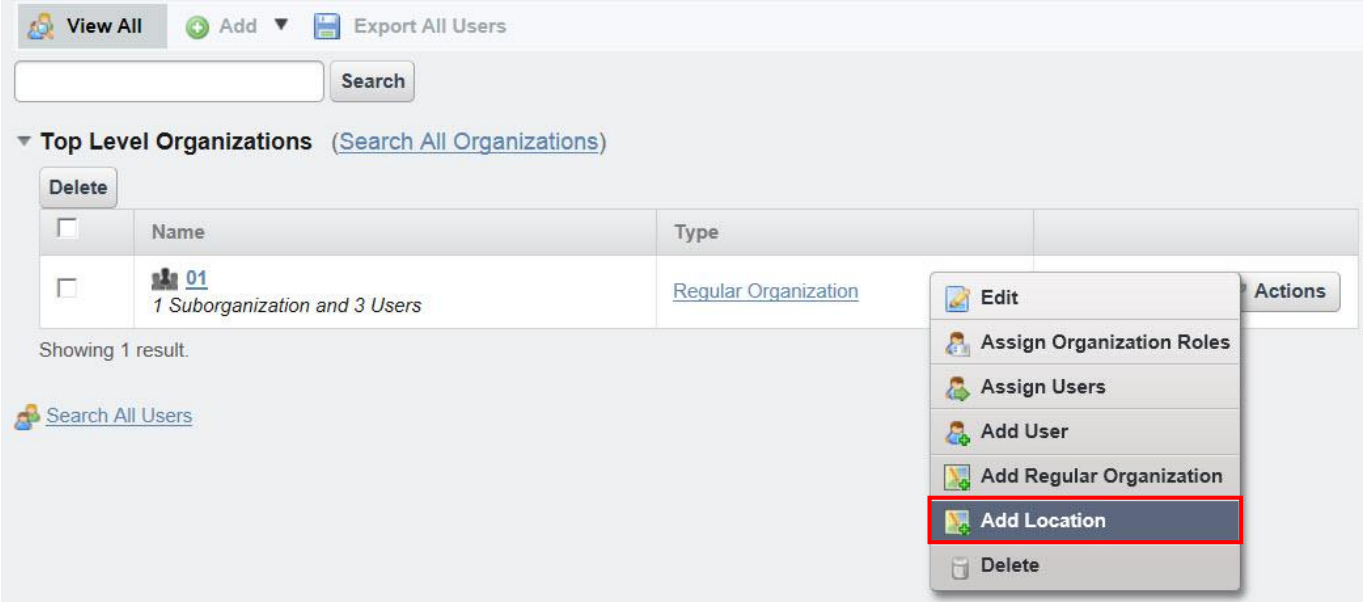
Click “Actions” on the right of “Organization” data entry and then select “Add Regular Organization” to add a regular organization under this organization.



For regular organization addition method, please refer to the foregoing “Add Organization” section.

9.3.2.10 Add Suborganization

Click “Actions” on the right of “Organization” data entry and then select “Add Location” to add a location under this organization.

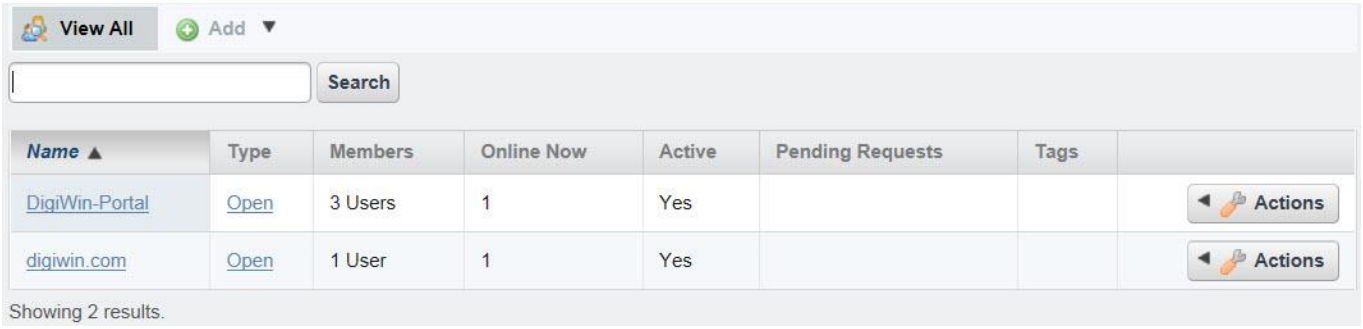


For location addition method, please refer to the foregoing “Add Organization” section.

9.3.3 Sites

9.3.3.1 View Site List

Press “View All” to view all created site lists.

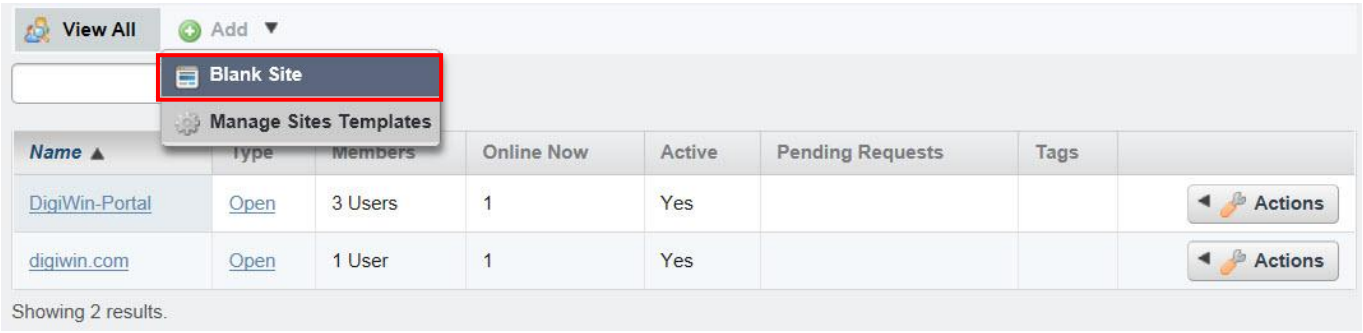


9.3.3.2 Search Site

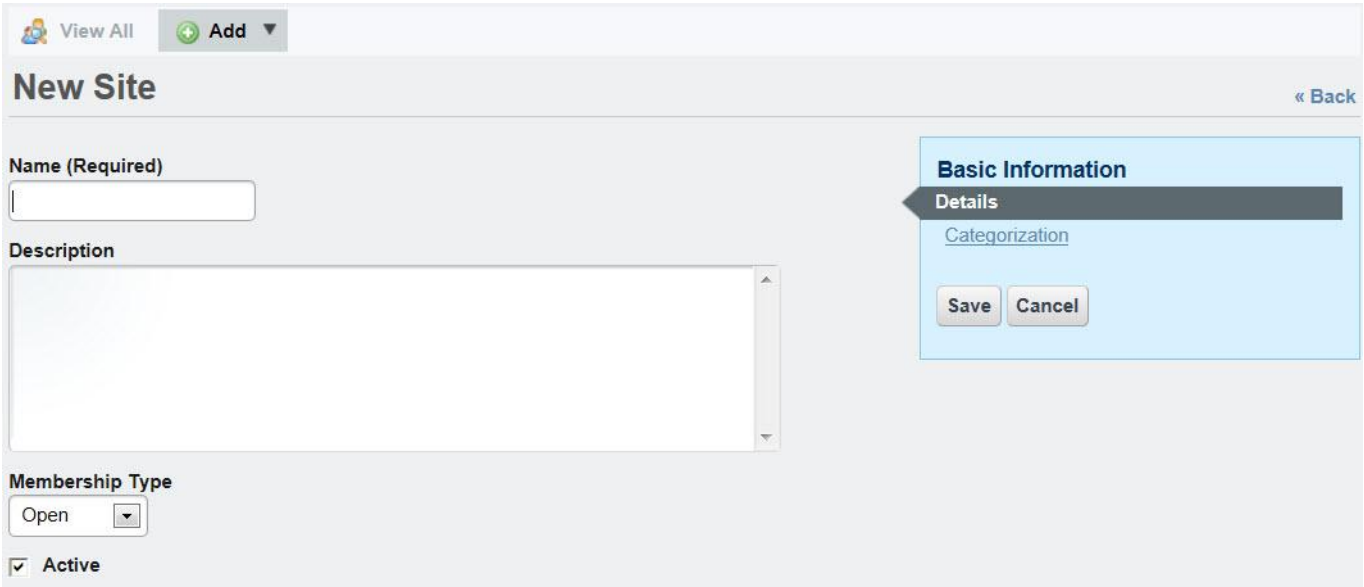
Enter the keyword of site name in the search field and press “Search”, and results that meet the conditions will be listed below.

9.3.3.3 Add Site

On the top of site page click “Add” to open the add site page.



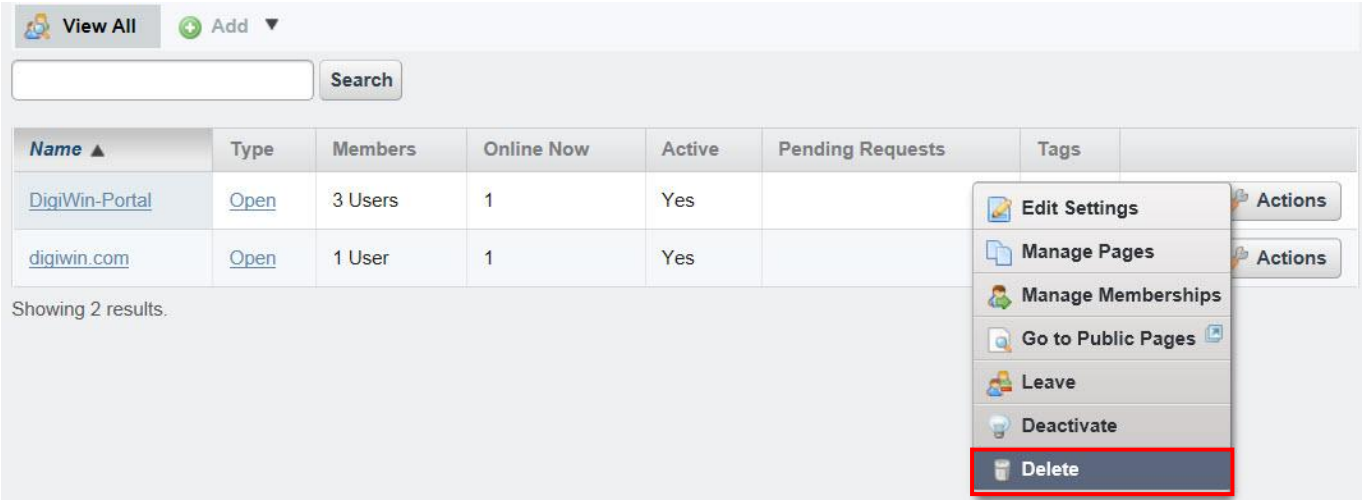
After entering related data, click “Save”.



- Name: Enter the name of the site
- Description: Enter the description of the site
- Membership Type: Select site type (open/restricted/private)
- Active: Check it for immediate activation of the site

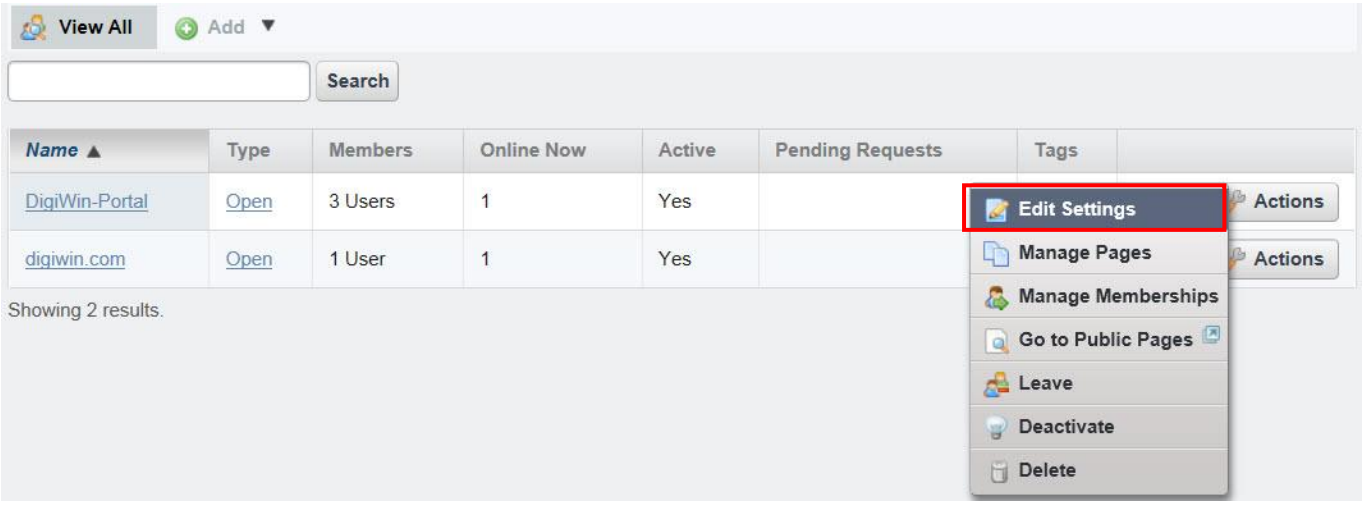
9.3.3.4 Delete Site

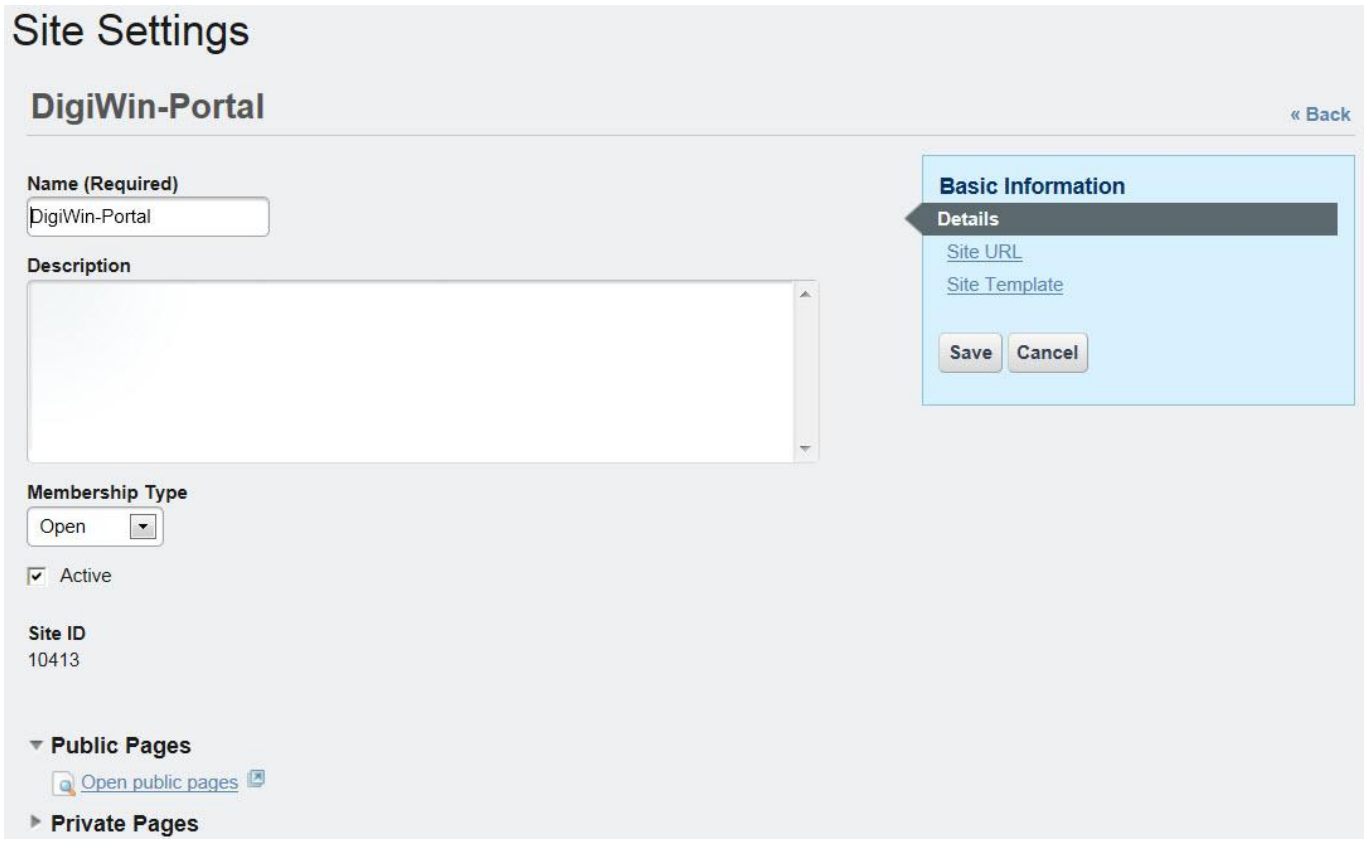
Click “Actions” on the right of “site” data entry to be deleted and then select “Delete”.



9.3.3.5 Edit Site Data

Click “Actions” on the right of “site” data entry and then select “Edit Settings” to access edit page.

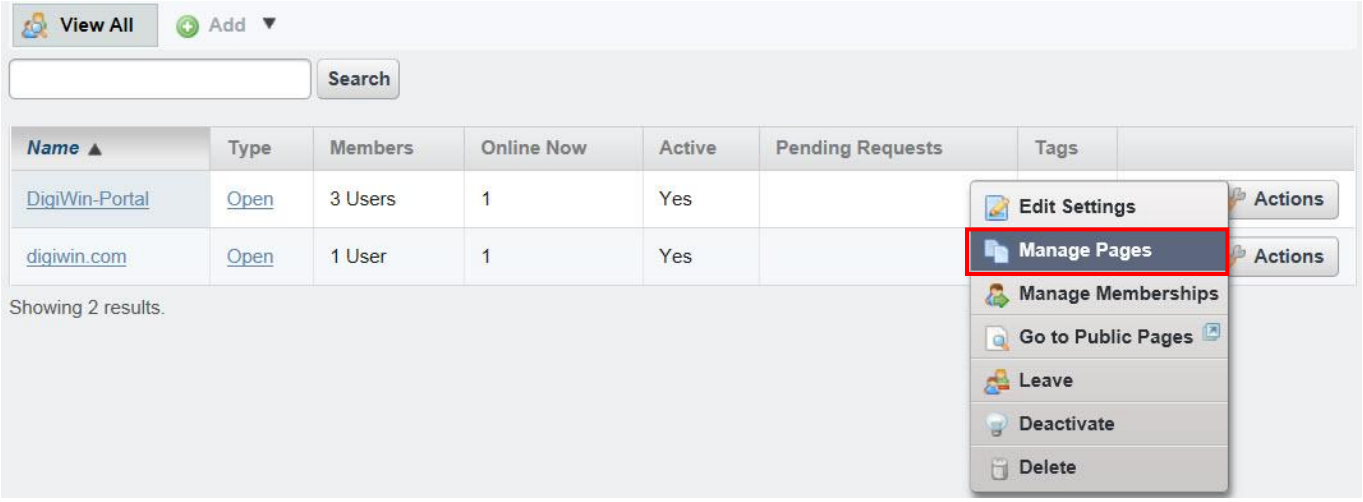




- Basic Information：Press “Details”, user can edit the site；Press “Site URL”, user can edit the friendly url and virtual hossts；Press “Site Templete”,user can see template of the site.
- Name: Enter the name of the site
- Description: Enter the description of the site
- Membership Type: Select site type (open/restricted/private)
- Active: Check it for immediate activation of the site
- Site ID: Show the site ID
- Public Pages/Private Pages: Show public page and private page of the site.

9.3.3.6 Manage Site Page

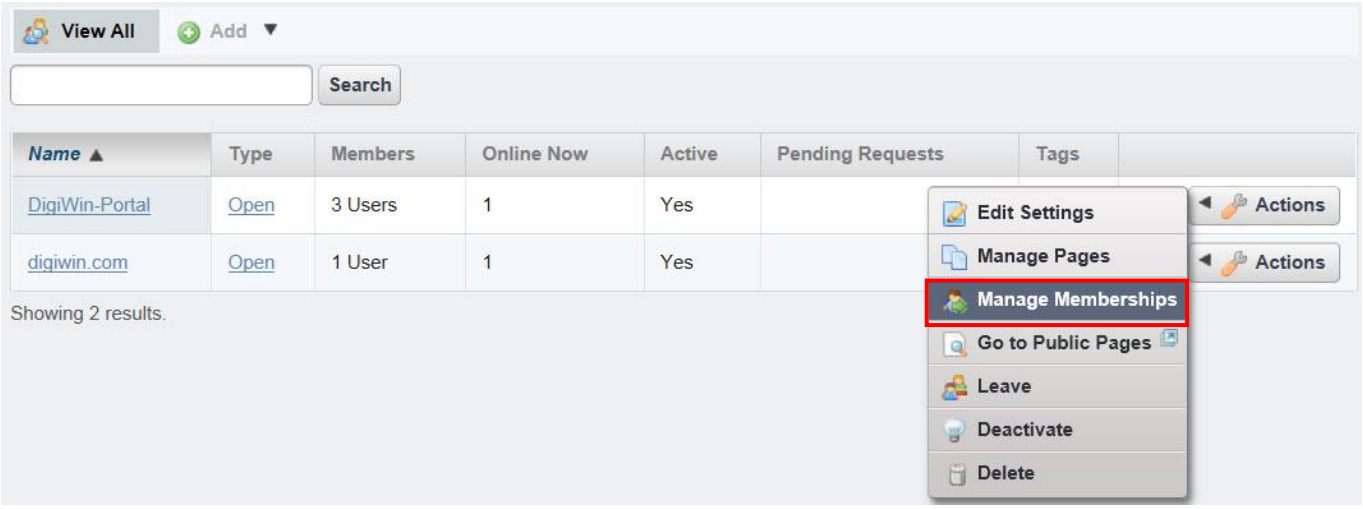
Click “Actions” on the right of “site” data entry and then select “Manage Pages” to manage the site’s open page and private page.



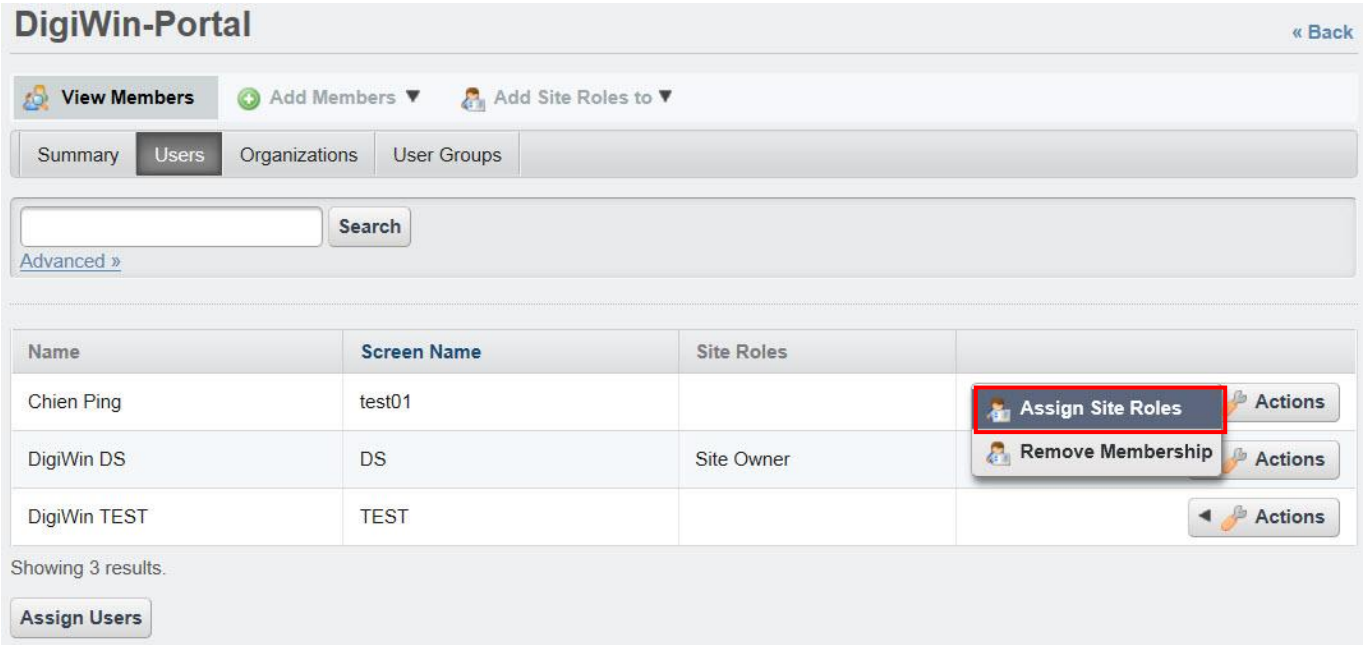
For page management method, please refer to “Management Page” section in “Start using DigiWin Portal”.

9.3.3.7 Set Site User Role

Click “Actions” on the right of “site” data entry and then select “Manage Memberships” to assign roles to the site’s users.



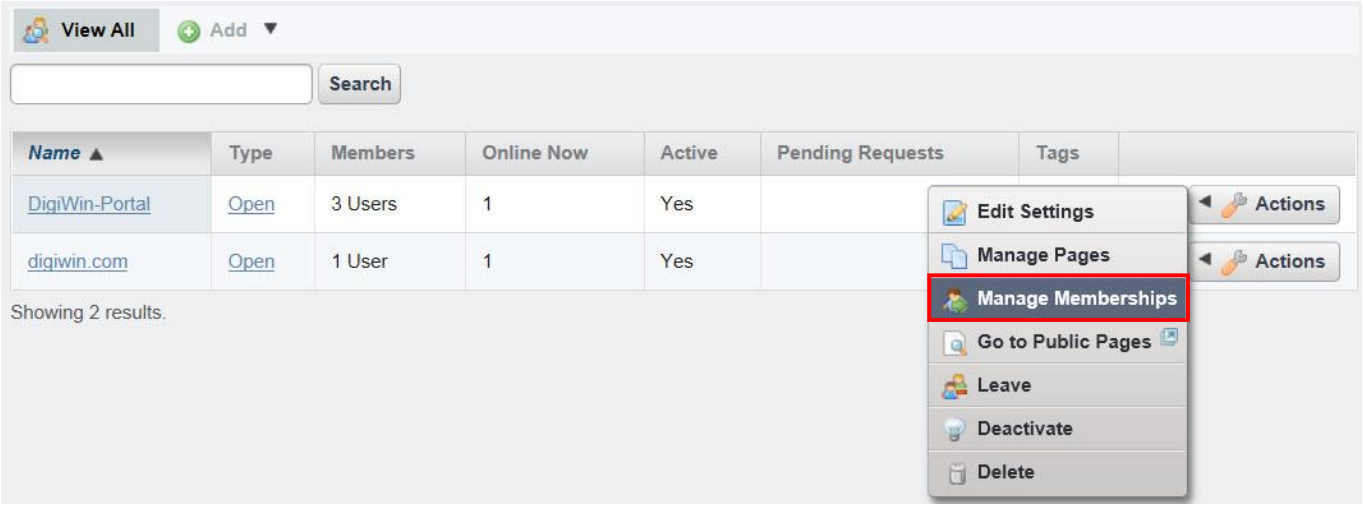
After accessing the setting page, click “Actions” on the right of “user” data entry and then select “Assign Site Roles”.



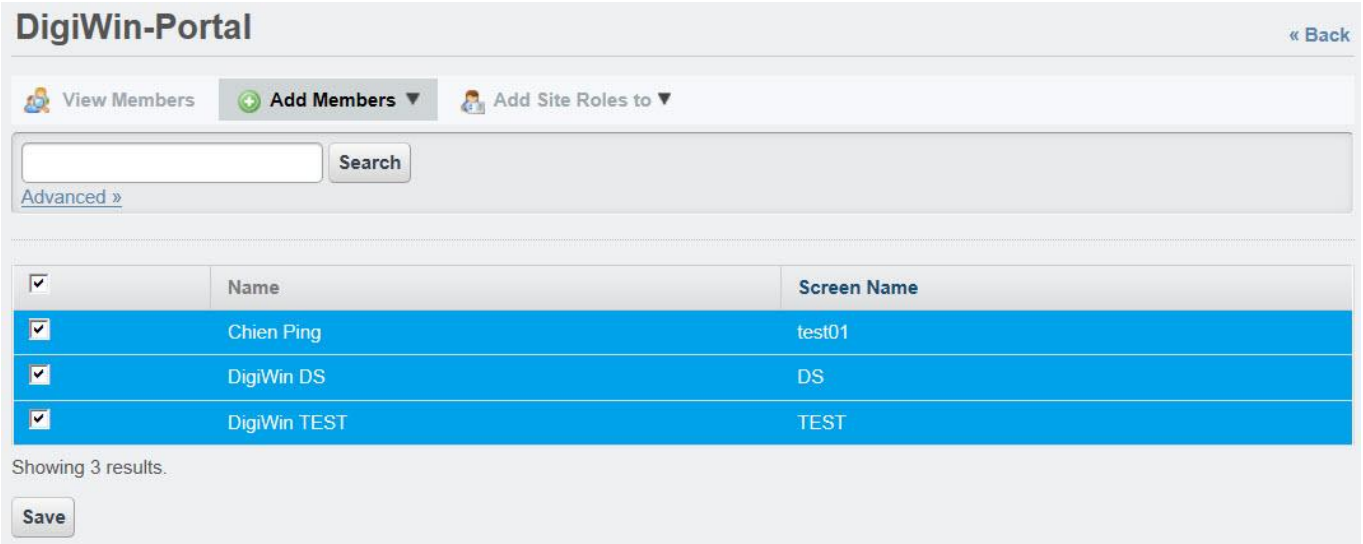
select the role to be set, check the user and press “Update Associations”.

9.3.3.8 Designate Site Member

Click “Actions” on the right of “site” data entry and then select “Manage Memberships” to designate members for the site.

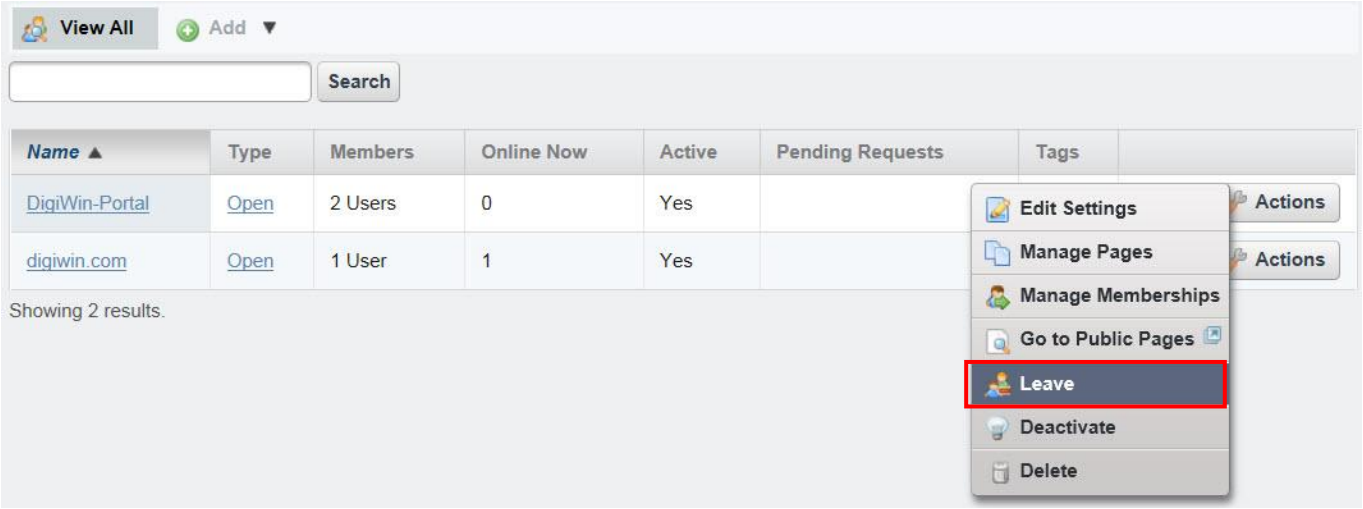


After accessing the setting page, check the users designated for this site and press “Save”.



9.3.3.9 Withdraw Site Member

Click “Actions” on the right of “site” data entry and then select “Leave” to withdraw the user from the site.



9.3.4 User Group

9.3.4.1 View User Group List

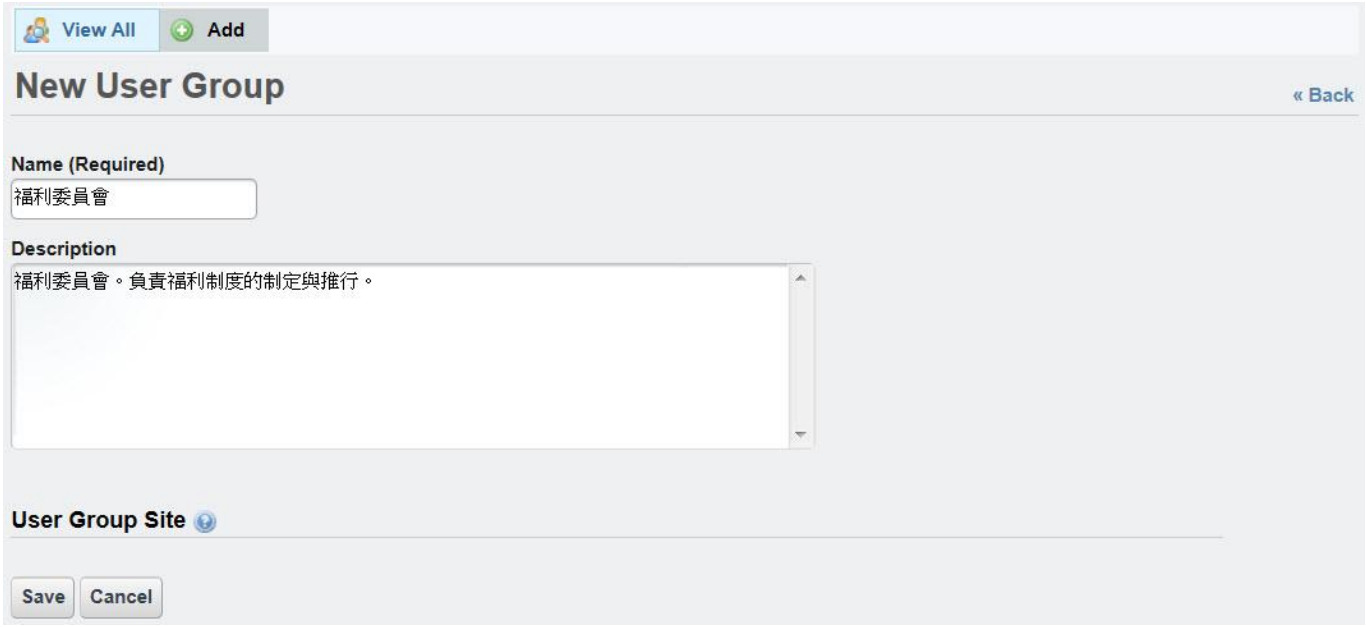
Press “View all” to view all created user group lists.

9.3.4.2 Search User Group

Enter the keyword of the user group name in the search field and click “Search”, and results that meet the conditions will be listed below.

9.3.4.3 Add User Group

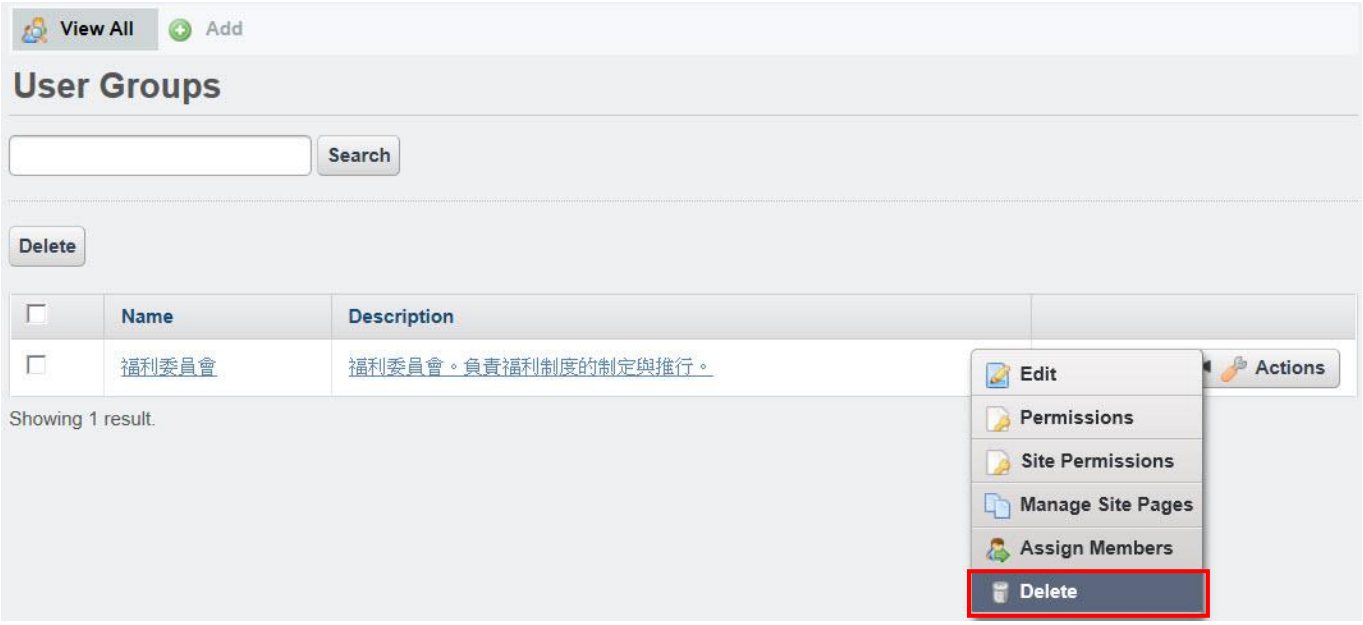
On the top of user group page click “Add” to open the add user group page. After entering related data, click “Save”.



- Name: Enter the name of the user group
- Description: Enter the description of the user group
- User Group Site: The site of a user group cannot be accessed directly by end users. The pages of a user group will be shown automatically as part of the public or private pages of the personal site of each user who belongs to the user group. To allow users to make changes, enable the customization options of each page.

9.3.4.4 Delete User Group

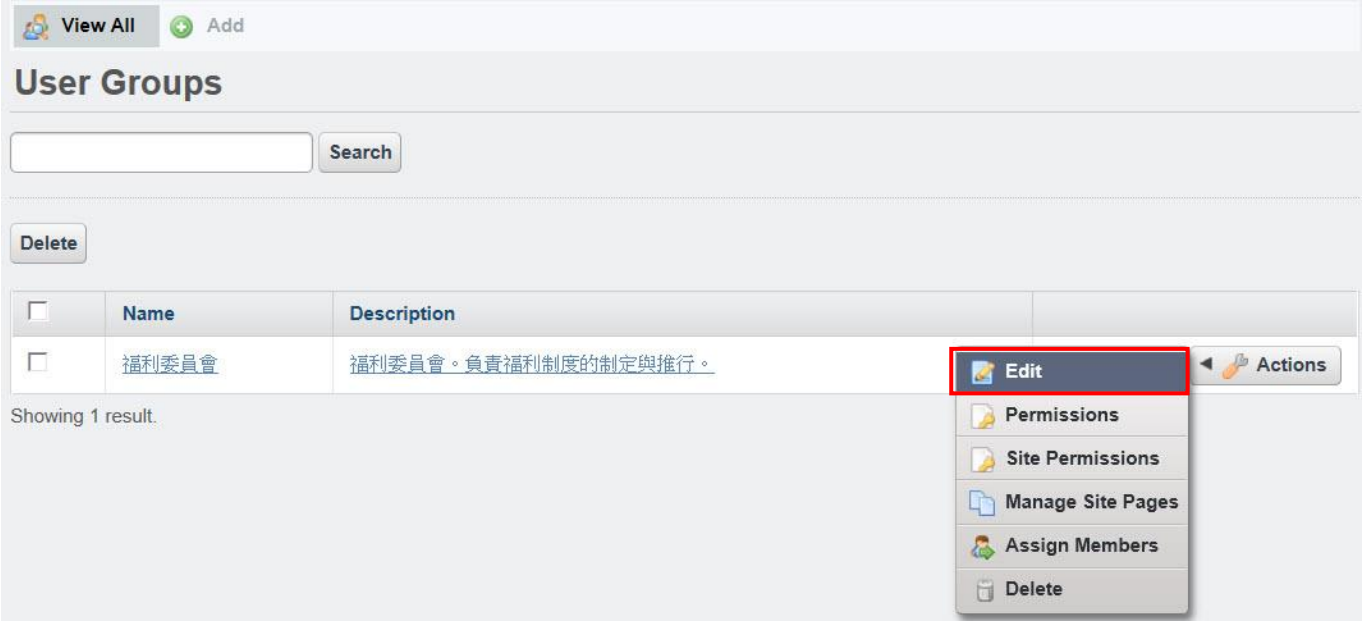
In “User Group” data entry check the data to be deleted and press “Delete”.



Tips If the user group to be deleted has designated members, the prompt message saying “Cancel the association between the user group and its members” will pop up during deletion. Press “OK” to delete the user group and cancel its association with its members.

9.3.4.5 Edit User Group Data

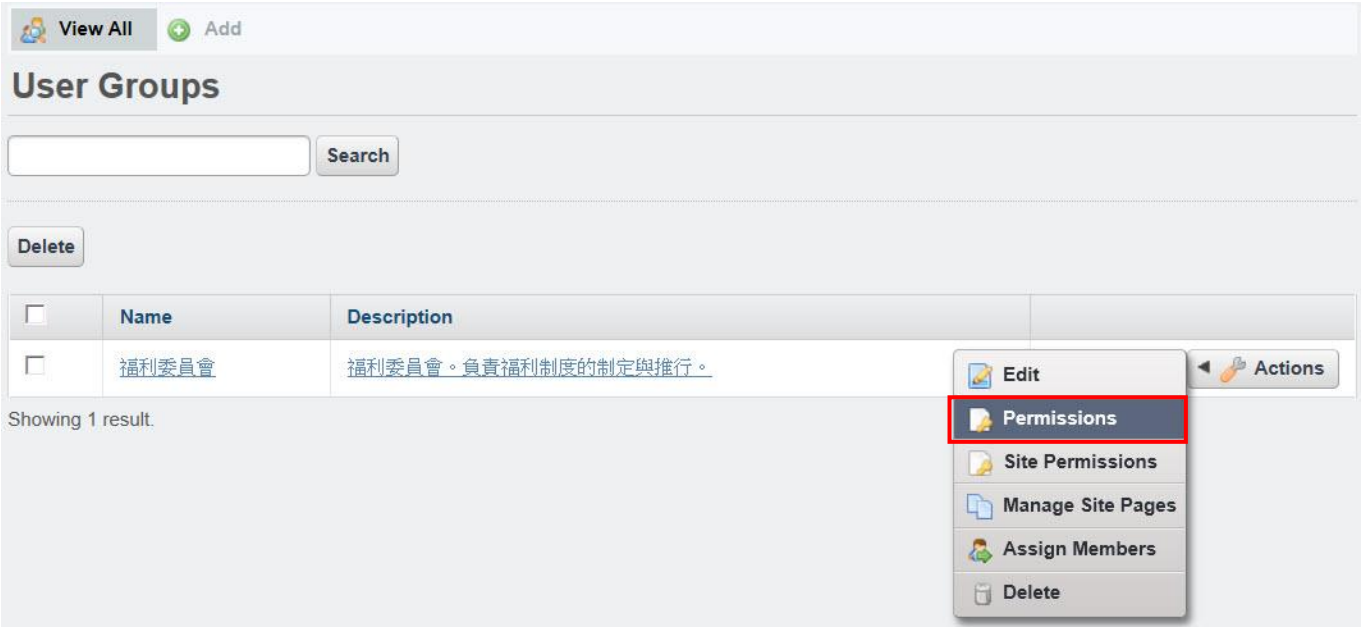
Click “Actions” on the right of “User group” data entry and then select “Edit” to access edit page.



For user group data, please refer to the foregoing “Add User Group” section.

9.3.4.6 Set User Group Data Permission

Click “Actions” on the right of “User group” data entry and then select “Permissions” to access the user group’s data permission setting page.



Permission setting:

Data entity	User group
Permitted to	Assign Members, Delete, Manage Announcements, Permissions, Update, View

9.3.4.7 Set User Group Site Data Permissions

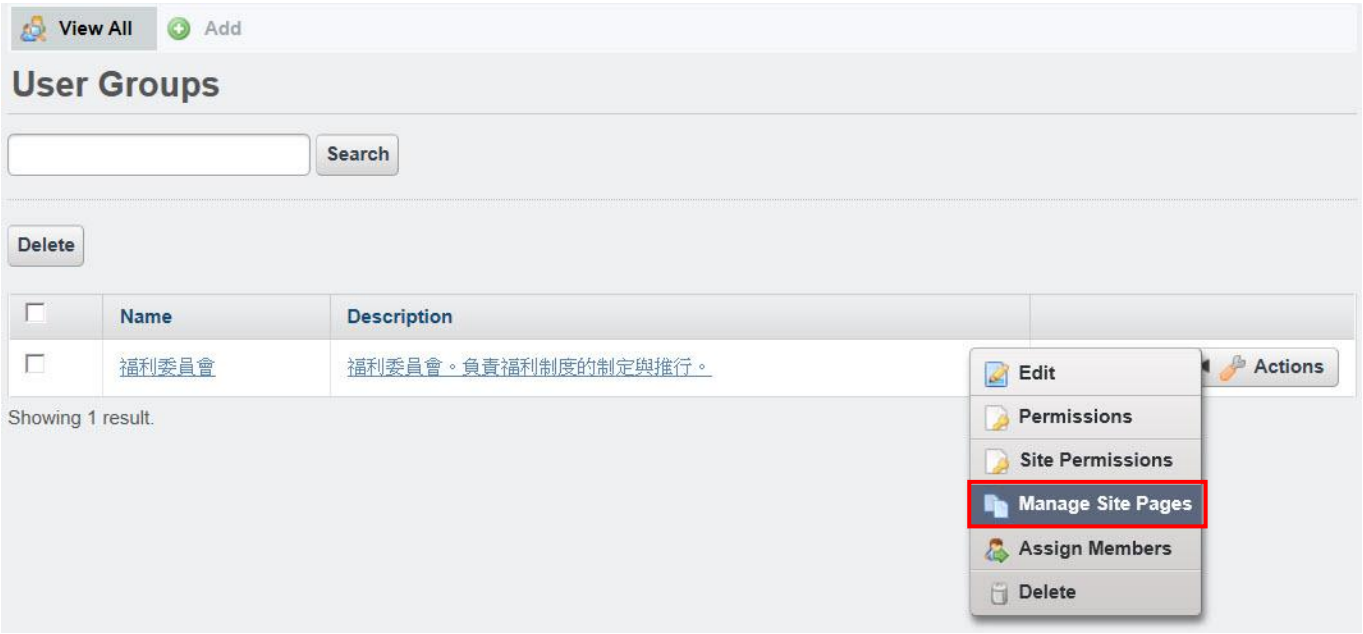
Click “Actions” on the right of “User group” data entry and then select “Site Permissions” to access the user group site’s data permission setting page.

Permission setting:

Data entity	User group site
Permitted to	Add Page, Add Page Variation, Add Site Pages Variation, Assign Members, Assign User Roles, Configure Applications, Delete, Export/Inport Application Info, Export/Inport Pages, Manage Announcements, Manage Archived Setups, Manage Pages, Manage Staging, Manage Teams, Permissions, Publish Staging, Publish to Remote, Update, View, View Members, View Staging

9.3.4.8 Manage User Group Page

Click “Actions” on the right of “User group” data entry and then select “Manage Site Pages” to manage the user group’s open page and private page.



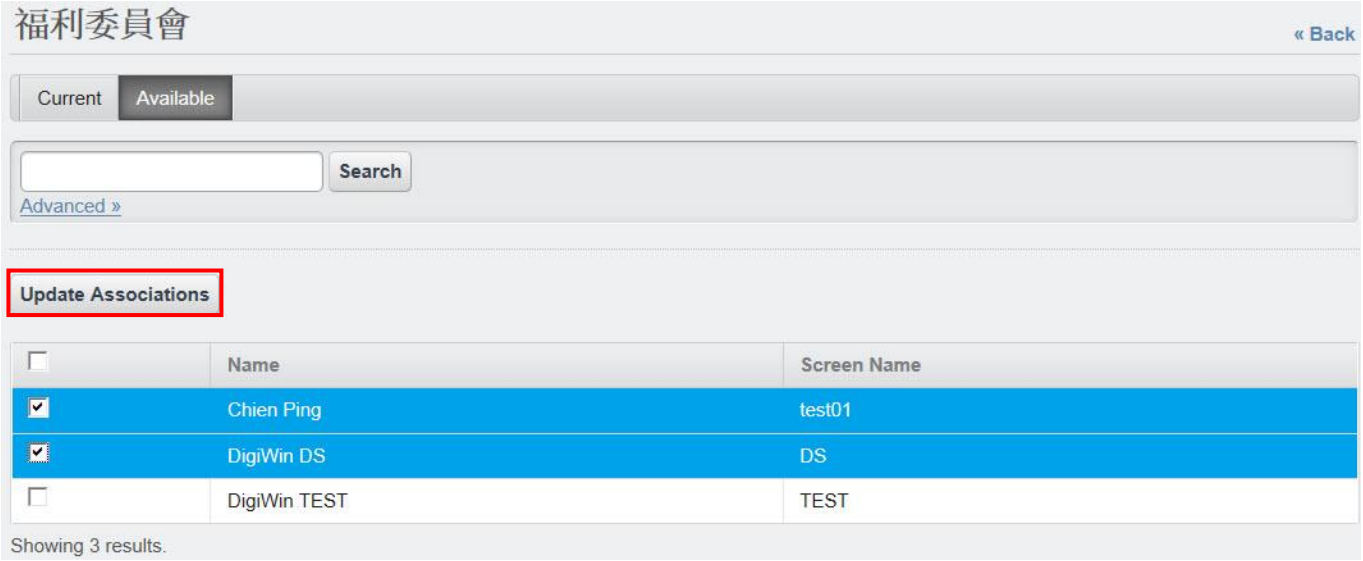
For page management method, please refer to “Management Page” section in “Start using DigiWin Portal”.

Tips When the user is designated as a member of the group for the first time, the group page set here will be automatically copied to the user’s own page.

9.3.4.9 Designate User Group Member

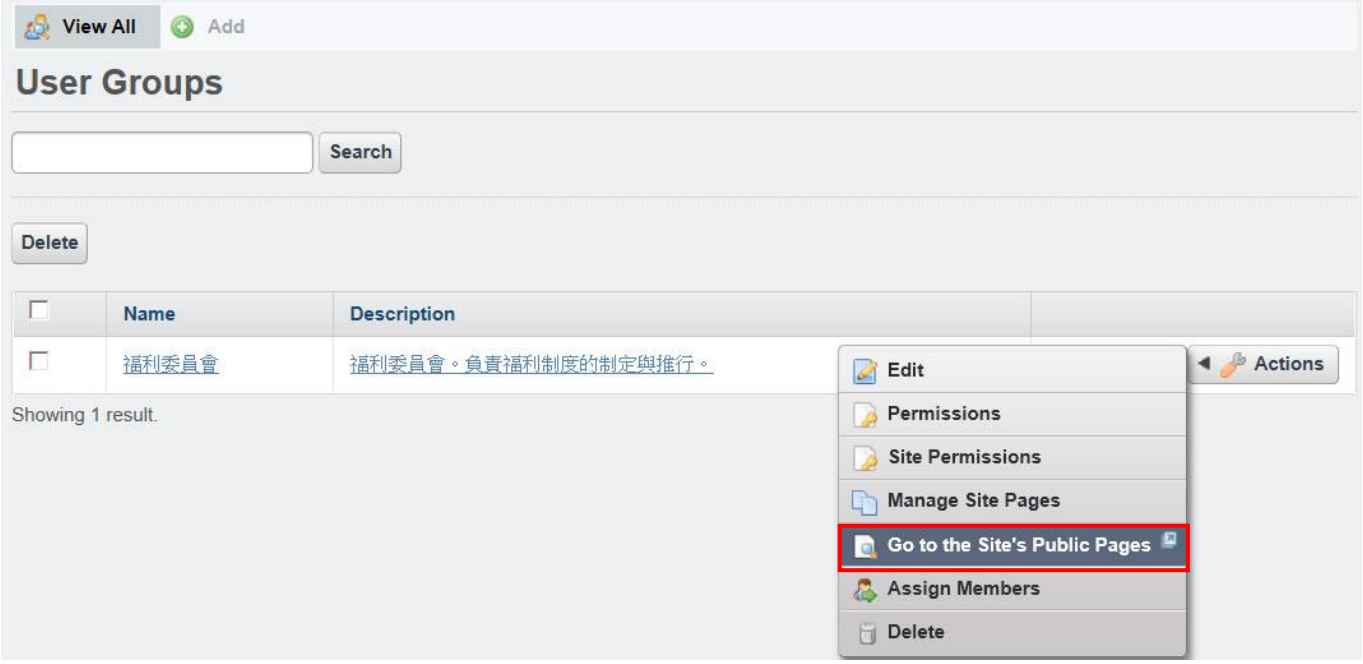
Click “Actions” on the right of “User group” data entry and then select “Assign Member” to designate a member for the user group.

After accessing the setting page, check the user designated for the user group and press “Update Associations”.



9.3.4.10 View the Site's Public Pages

Click "Actions" on the right of "User group" data entry and then select "Go to the Site's Public Pages" to open the site's public page.



9.3.5 Role

9.3.5.1 Default Role

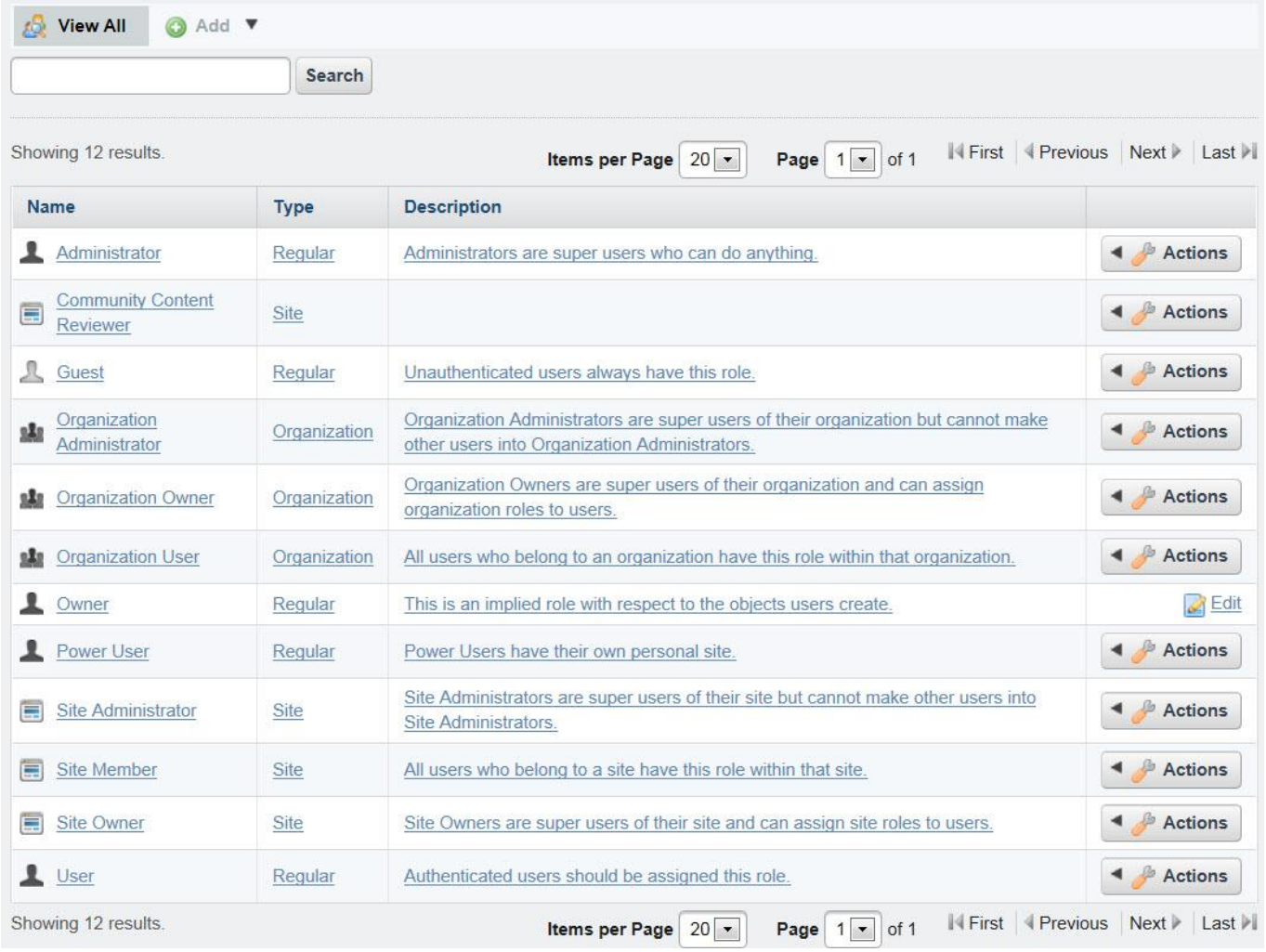
Portal user roles are divided into three types: ordinary, site and organization. Each type has the following default roles:

Type / Classification	Ordinary	Site	Organization
System administrator	Administrator	Site Administrator	Organization Administrator
Owner	Owner	Site Owner	Organization Owner
Ordinary user	Power User、User	Site Member	Organization Member
Guest	Guest	—	—

Default roles are preserved items and may not be deleted. Any role added by the user must not have the same name as preserved items do.

9.3.5.2 View Role List

Press “View All” to view all created role lists.

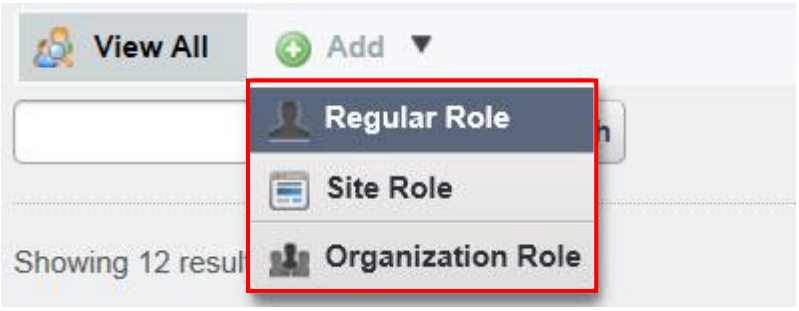


9.3.5.3 Search Role

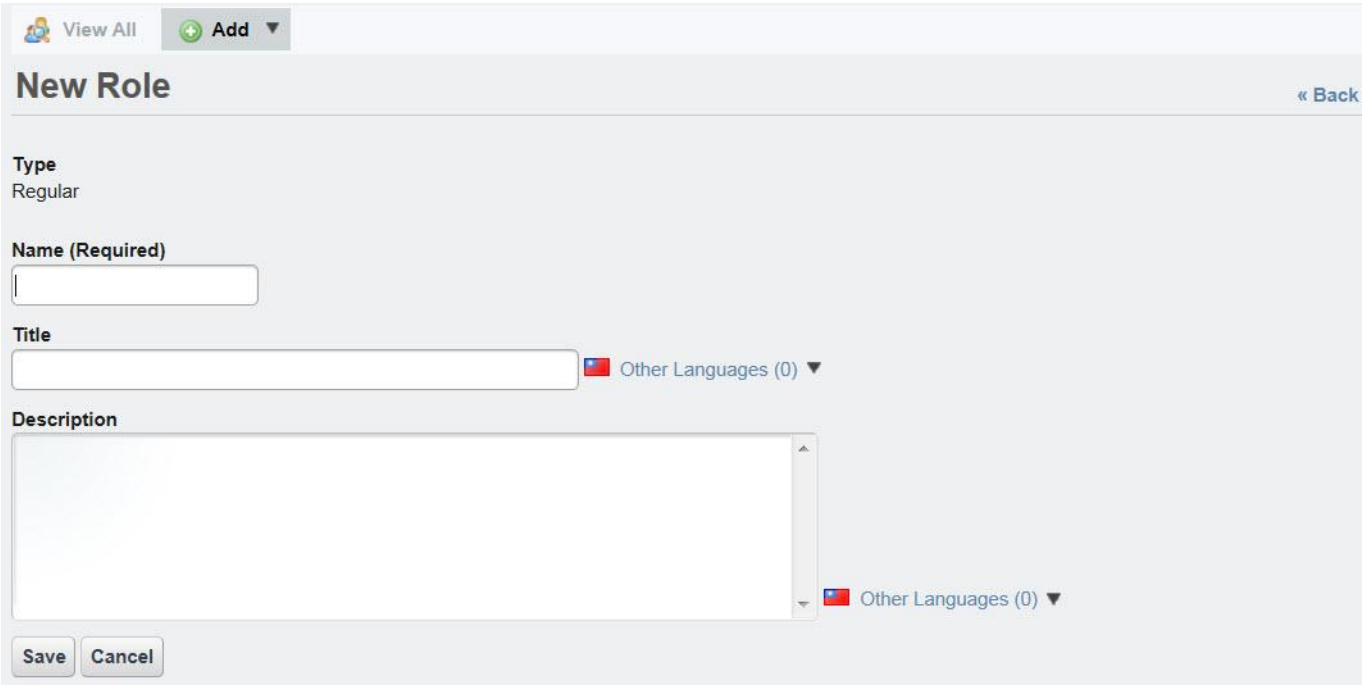
Enter the keyword of role name in the search field and press “Search”, and results that meet the conditions will be listed below.

9.3.5.4 Add Role

On the top of role page press “Add” and select a role type to open the add role page (Regular Role/ Site Role/ Organization Role).



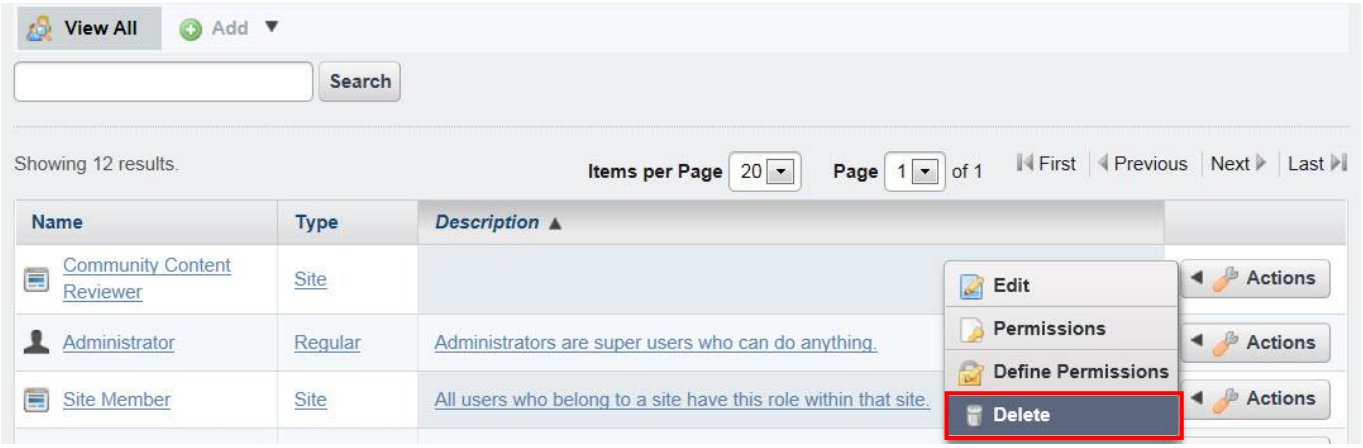
After entering related data, click “Save”.



- Name: Enter the name of the role
- Title: Enter the title of the role
- Description: Enter the description of the role

9.3.5.5 Delete Role

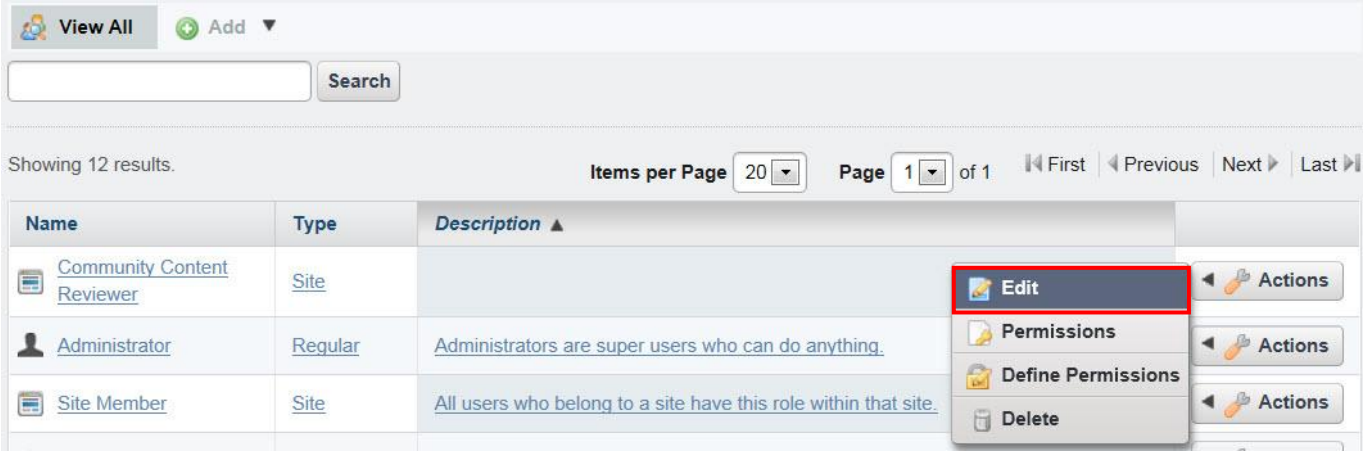
Click “Actions” on the right of “Role” data entry to be deleted and then select “Delete”.



Tips Default roles may not be deleted, while any role added by the user may be deleted.

9.3.5.6 Edit Role Data

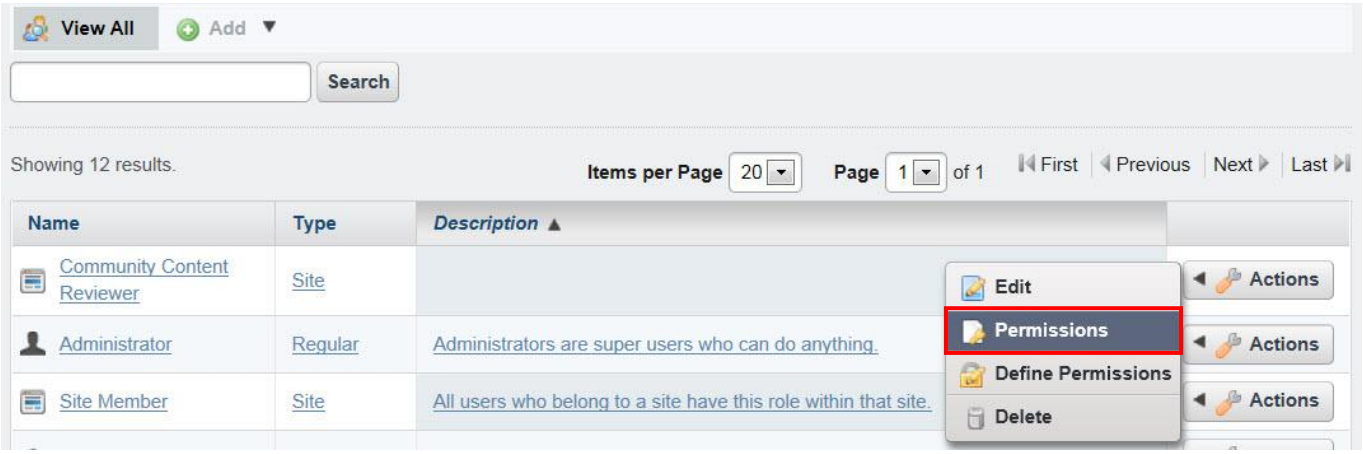
Click “Actions” on the right of “Role” data entry and then select “Edit” to access edit page.



For role data, please refer to the foregoing "Add Role" section.

9.3.5.7 Set Role Data Permission

Click "Actions" on the right of "Role" data entry and then select "Permissions" to access the role's data permission setting page.

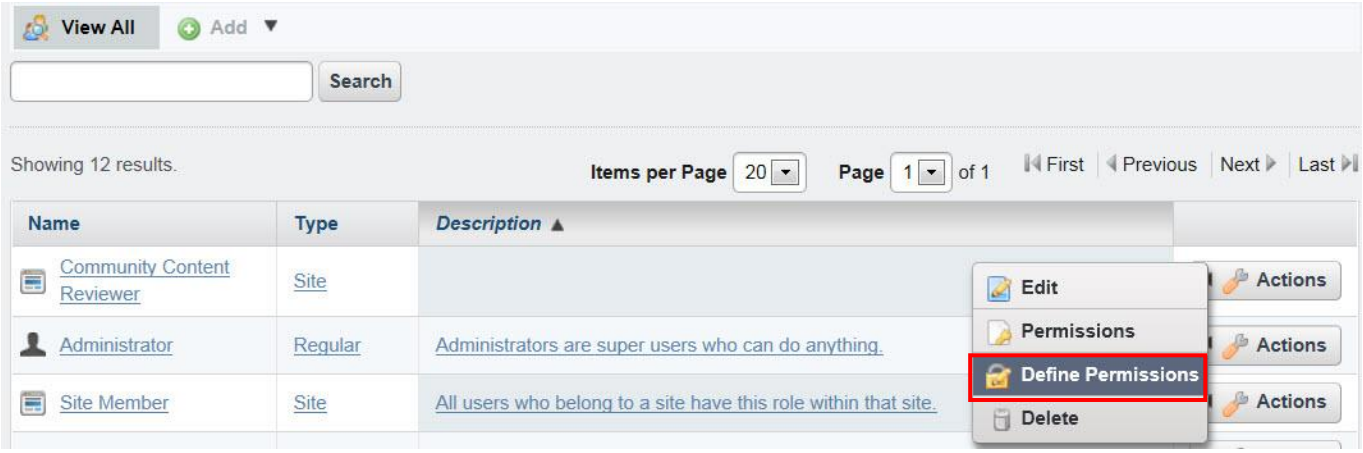


Permission setting:

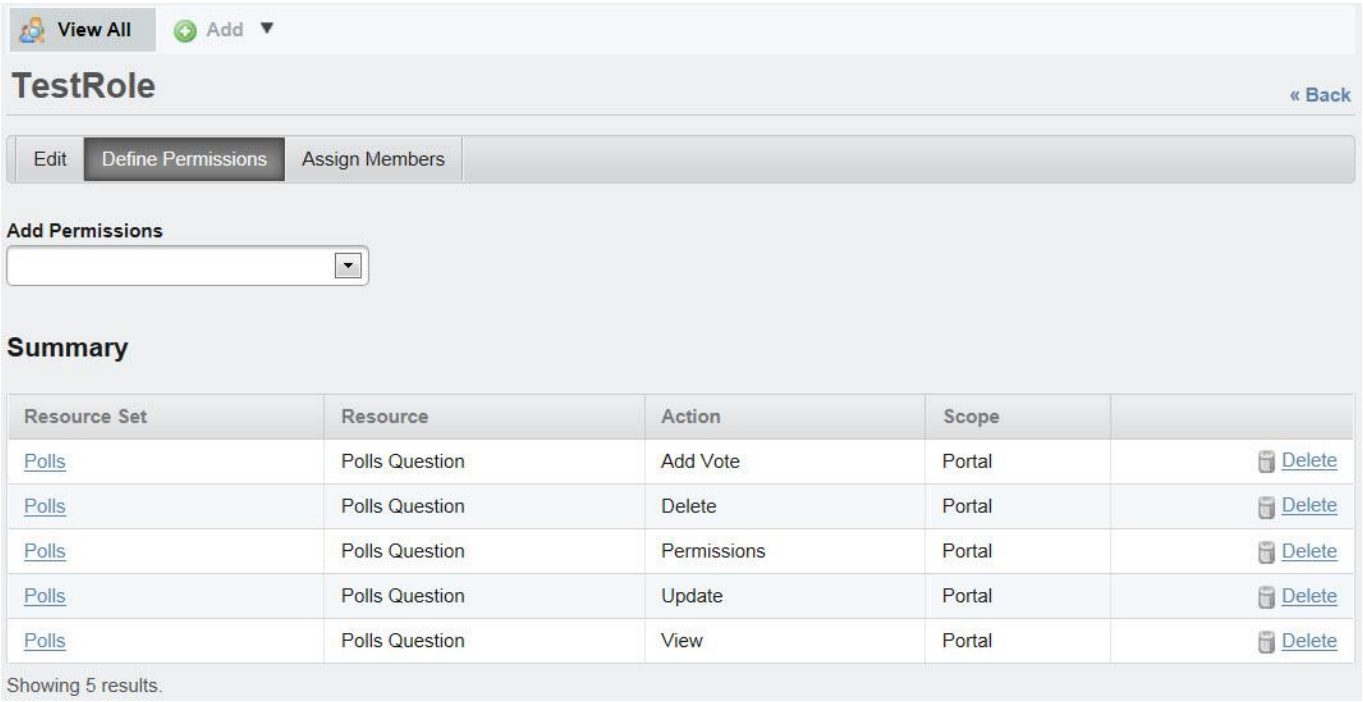
Data entity	Role
Permitted to	Assign Members, Define Permissions, Delete, Manage Announcements, Permissions, Update, View

9.3.5.8 Define Role Permission

Click "Actions" on the right of "Role" data entry and then select "Define Permissions" to define permission for the role.

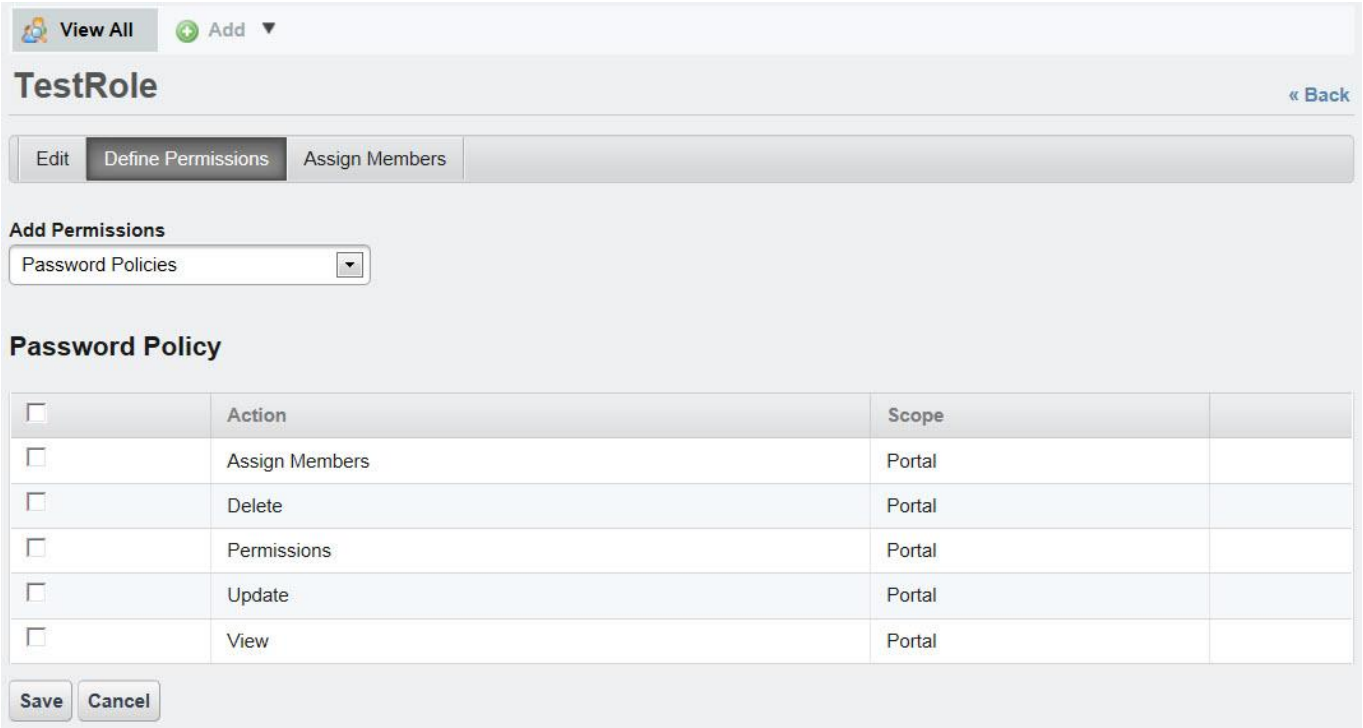


In “Define Permissions” page, user can add permissions from the “Add Permissions” menu; permissions of the role are listed “Summary”, press “Delete” can cancel the permission.



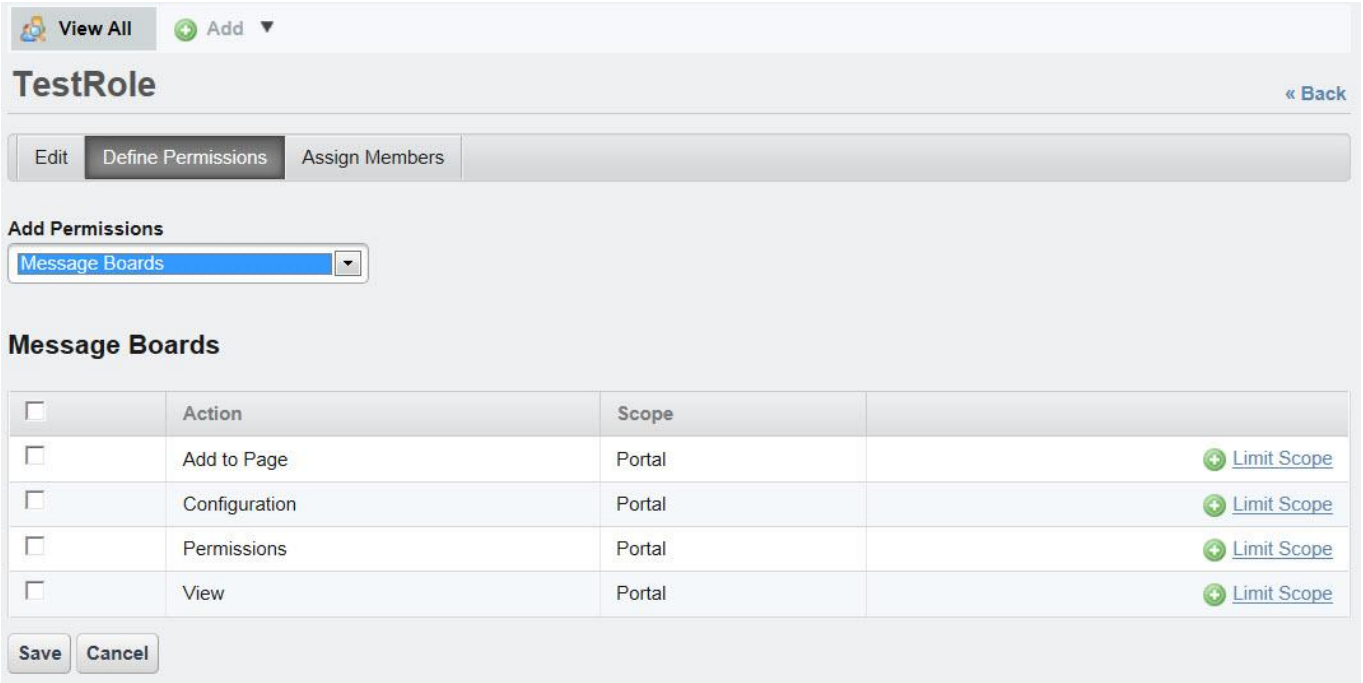
There are six parts in “Add Permissions” menu: “Portal”, “Site Content”, “Site Applications”, “Control Panel: Personal”, “Control Panel: Site”, “Control Panel: Portal”.

Portal permission: The items available for setting mainly include general, password policies, roles, sites, user and organizations.



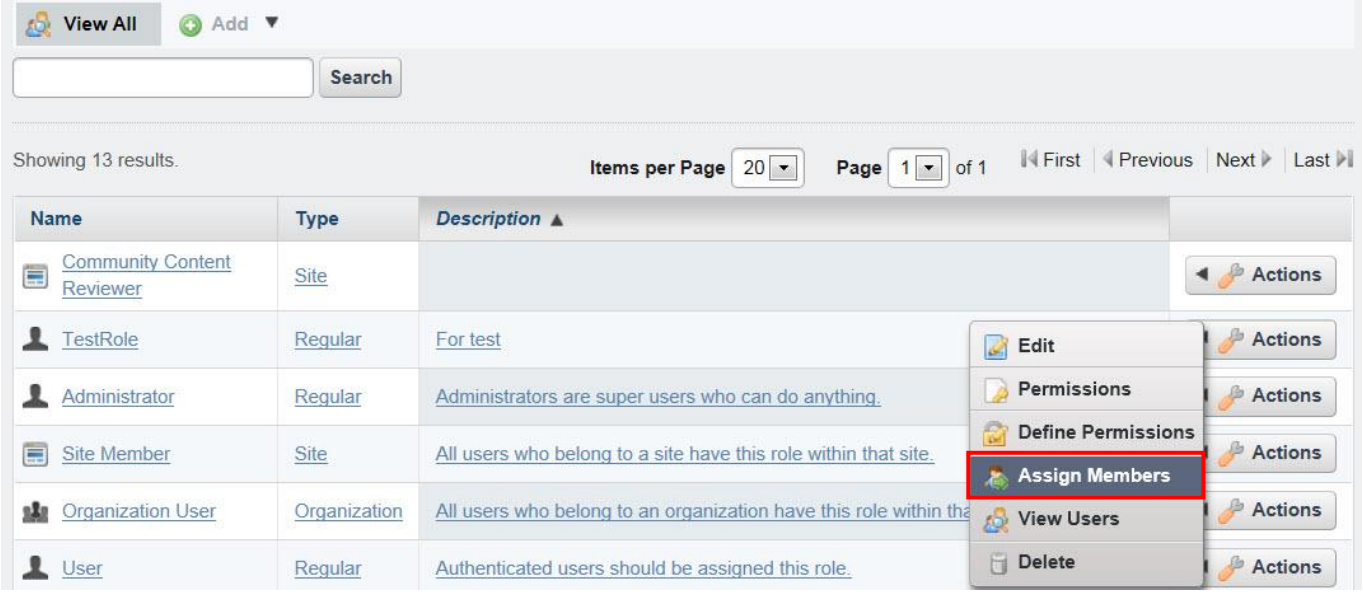
Tips All Portlets have different functions, so the activities available for permission setting may also differ.

The other parts are concerned with portlet permissions. For example, for "Message Boards" Portlet, the permission to activities such as setting, browsing, adding type and suspending can be set.

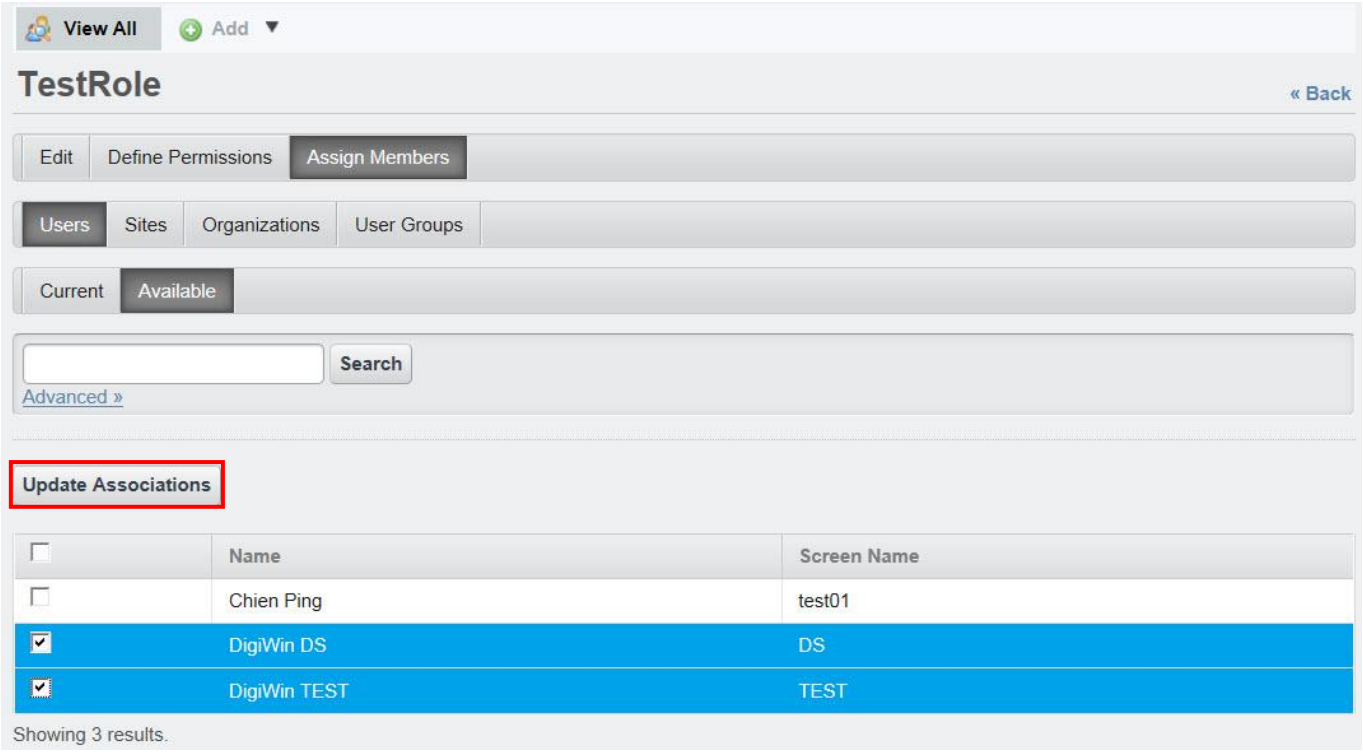


9.3.5.9 Assign Role Member

Click “Actions” on the right of “Role” data entry and then select “Assign Members” to designate members for the role.



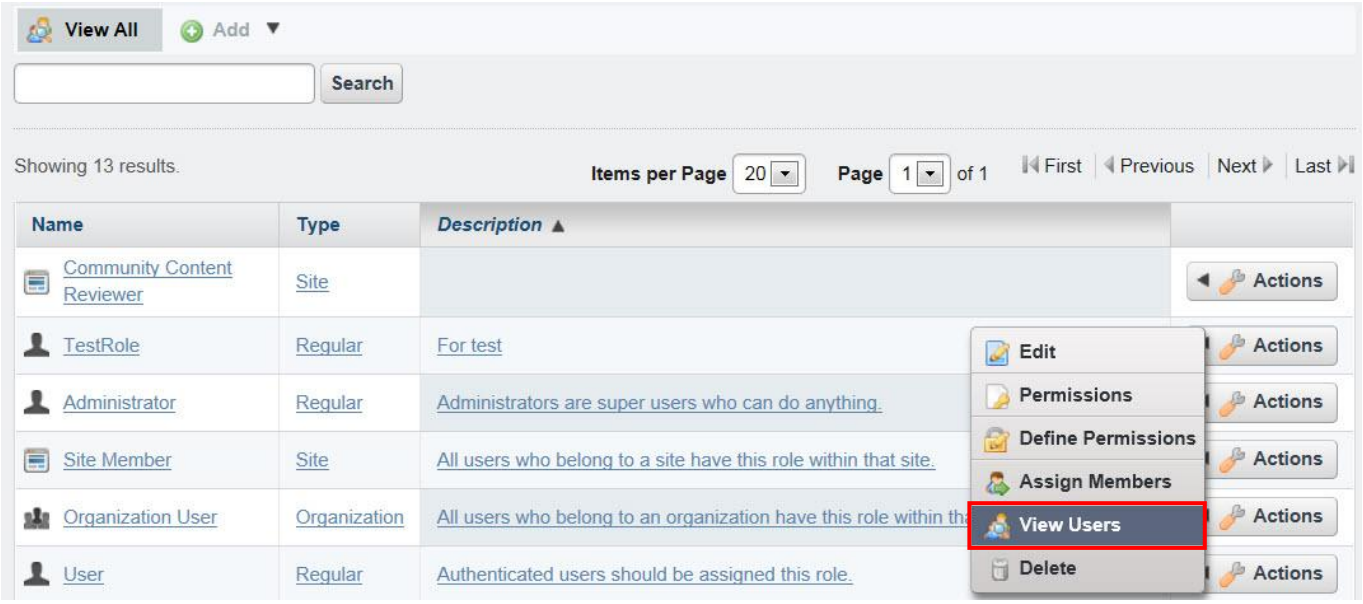
After accessing the setting page, the user can see “Current” and “Available” tabs. “Current” tab displays current users with permission and “Available” tab displays all users.



Check the user designated for the role and click “Update Associations” to change the permission.

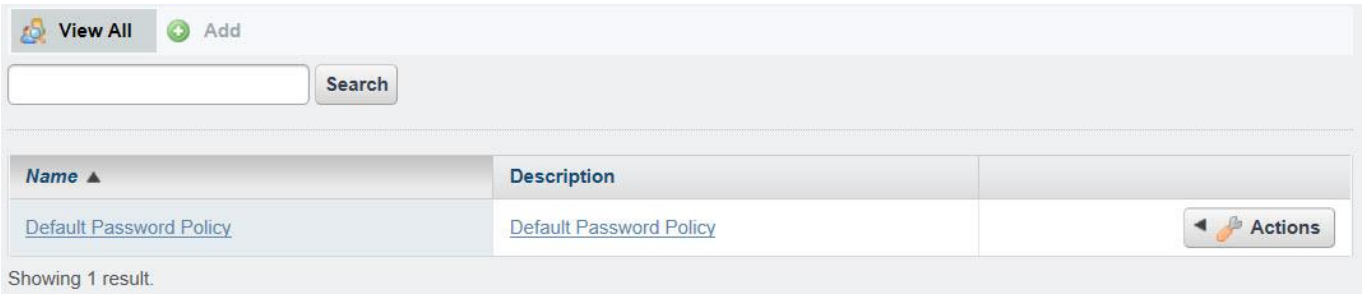
9.3.5.10 View Role Member

Click “Actions” on the right of “Role” data entry and then select “View users” to view the list of members designated for the role.



9.3.6 Password Policy

9.3.6.1 View Password Policy List

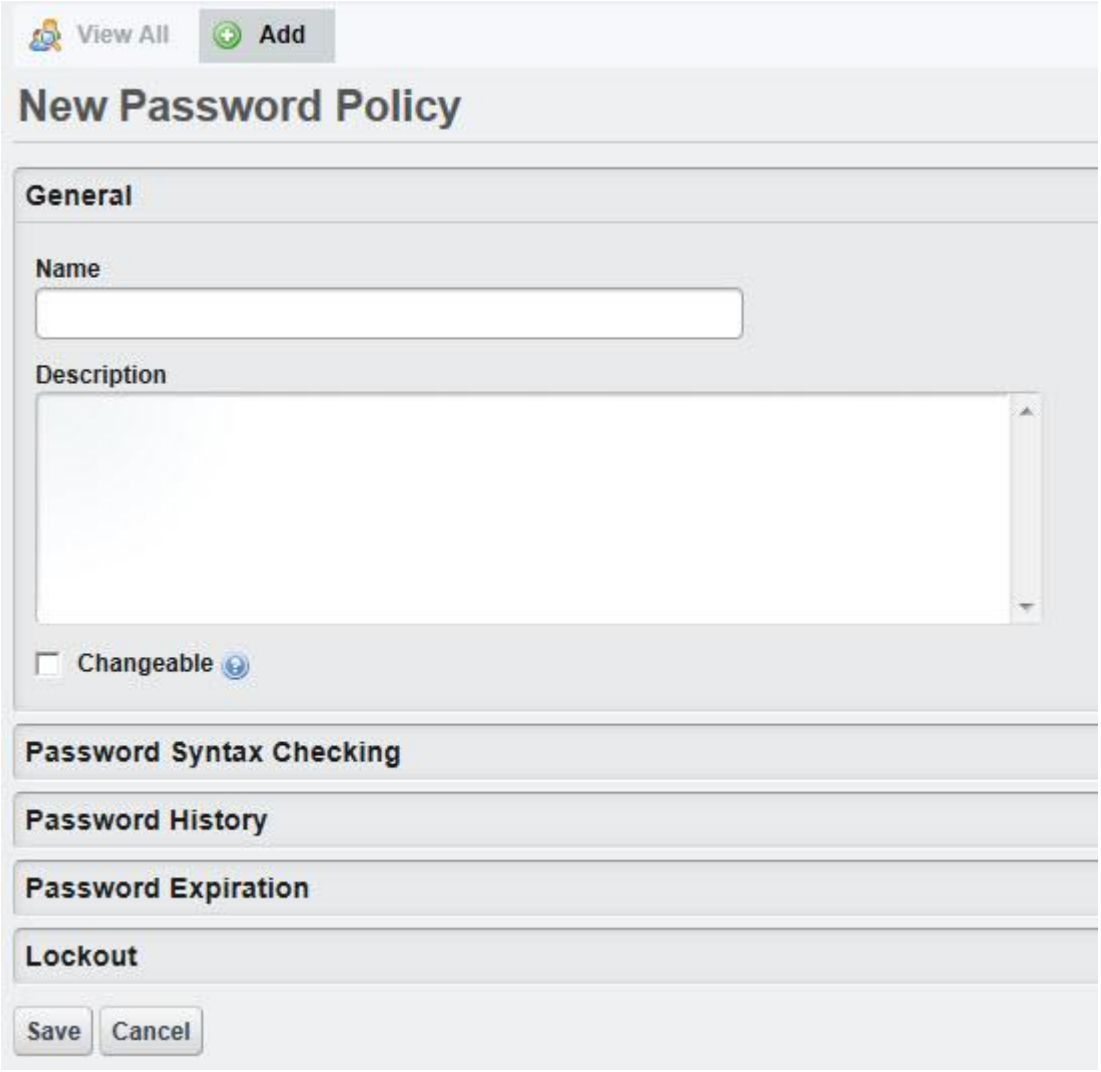


9.3.6.2 Search Password Policy

Enter the keyword of the name of password policy in the search field and press “Search”, and results that meet the conditions will be listed below.

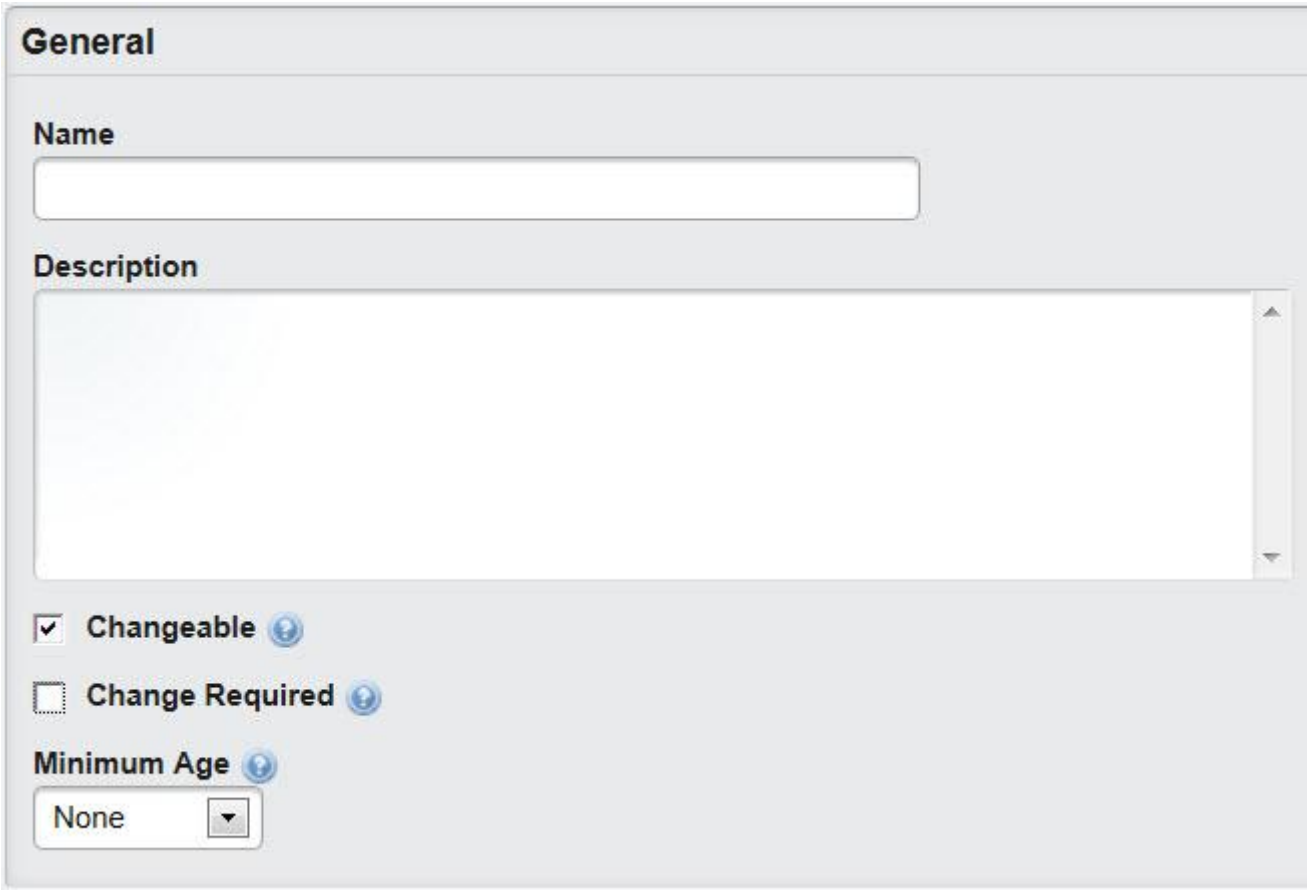
9.3.6.3 Add Password Policy

On the top of password policy page click “Add” to open the add password policy page. After entering related data, click “Save”.

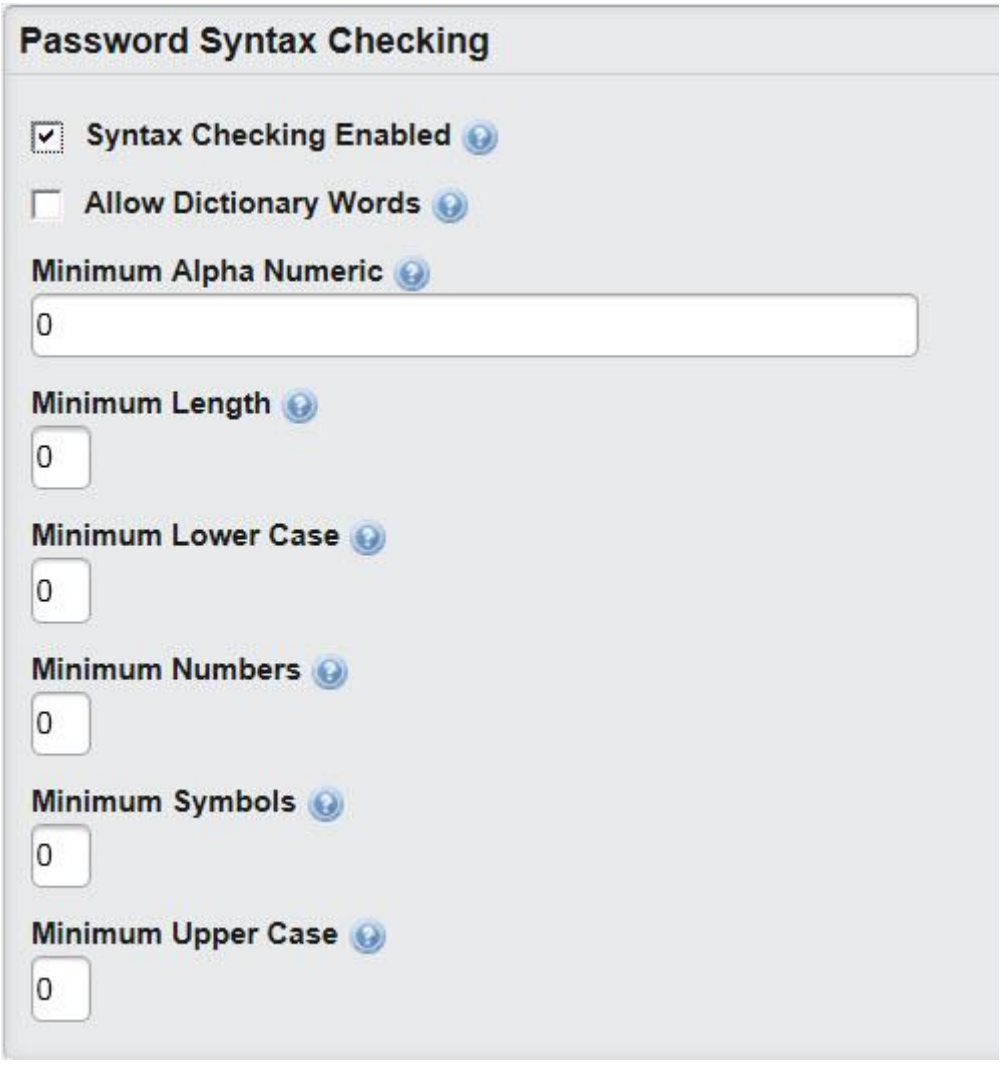


- Name: Enter the name of the password policy
- Description: Enter the description of the password policy
- Changeable: Check it for the user to modify his/her password.

Tips Password policy also provides other following settings, which may be selected according to requirement:



- General
  - Name: Enter the name of the password policy
  - Description: Enter the description of the password policy
  - Changeable: Check it for the user to modify his/her password.
  - Change Required: Check it for the need to modify the password when the user login in Portal for the first time.
  - Minimum Age: Set how long the user must wait for the next modification.



- Password syntax check
  - Syntax Check Enabled: Check it if the password must not be meaningful words, or must meet character length
  - Allow Dictionary Words: Check it if the user can set meaningful words
  - Minimum Alpha Numeral: Set the minimum alpha numeral
  - Minimum Length: Set the minimum length of the password
  - Minimum Lower Case: Set the minimum lower case of the password
  - Minimum Numbers : Set the minimum numbers of the password
  - Minimum Symbols: Set the minimum symbols of the password
  - Minimum Upper Case: Set the minimum quantity of capital letters in user password

- Historical password

- History Enabled: Check it for the system to preserve the user's previous password to avoid repeating previous password
- History count: Set the count of historical passwords preserved

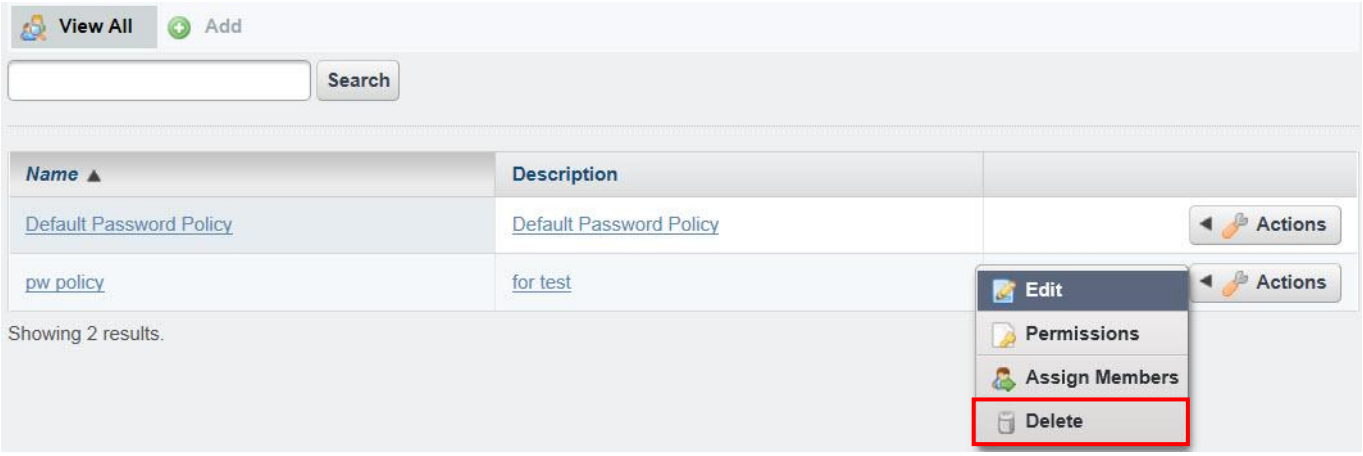
- Password Expiration
  - Expiration Enabled: Check it if the user password will expire after the designated time and must be changed
  - Maxinum Age: Set how often the password must be changed
  - Warning Time: Set the advance time of change notification before the password expires
  - Grace Limit: Set the times the user can log in without changing his/her password after the password expires

- Lockout
  - Lockout Enabled: Check it to activate account suspension conditions
  - Maximum Failure times: Set the maximum allowable times of wrong password entries and the account will be suspended if the allowable times are exceeded
  - Reset Failure Count: Set the time of keeping the record of wrong password entries

- Lockout Duration: Set the period of suspending user account

9.3.6.4 Delete Password Policy

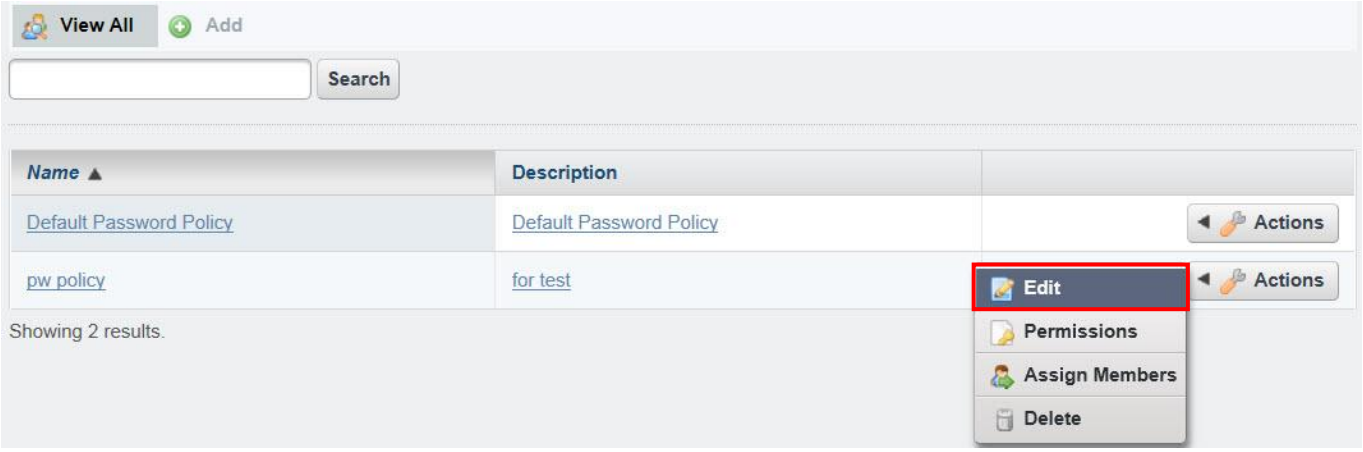
Click “Actions” on the right of “Password policy” data entry to be deleted and then select “Delete”.



Tips Default password policy may not be deleted, while any password policy added by the user may be deleted.

9.3.6.5 Edit Password Policy Data

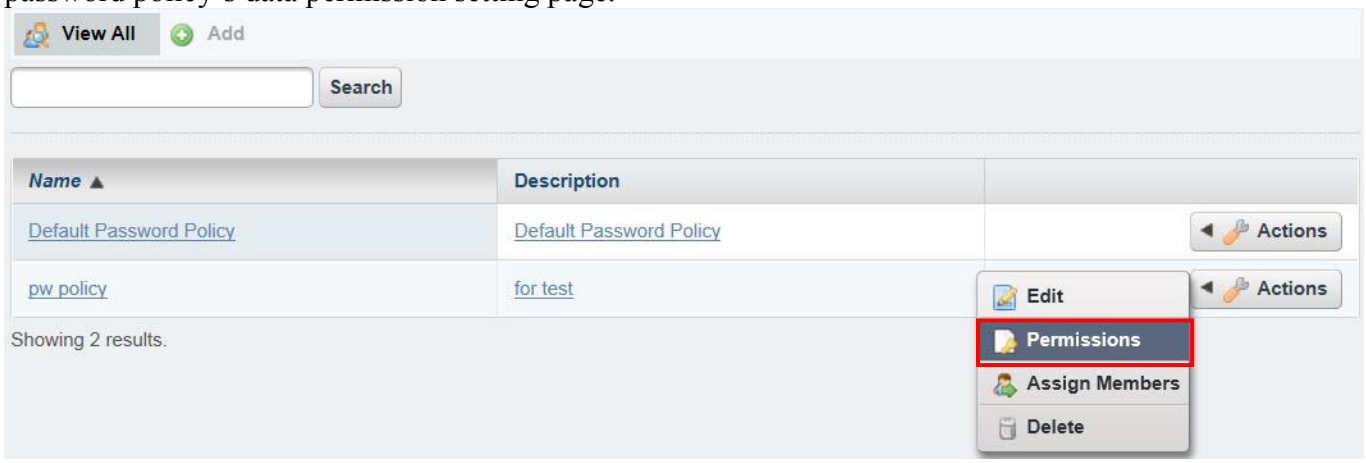
Click “Actions” on the right of “Password policy” data entry and then select “Edit” to access edit page.



For password policy data, please refer to the foregoing “Add Password Policy” section.

9.3.6.6 Set Password Policy Data Permission

Click “Actions” on the right of “Password policy” data entry and then select “Permissions” to access the password policy’s data permission setting page.

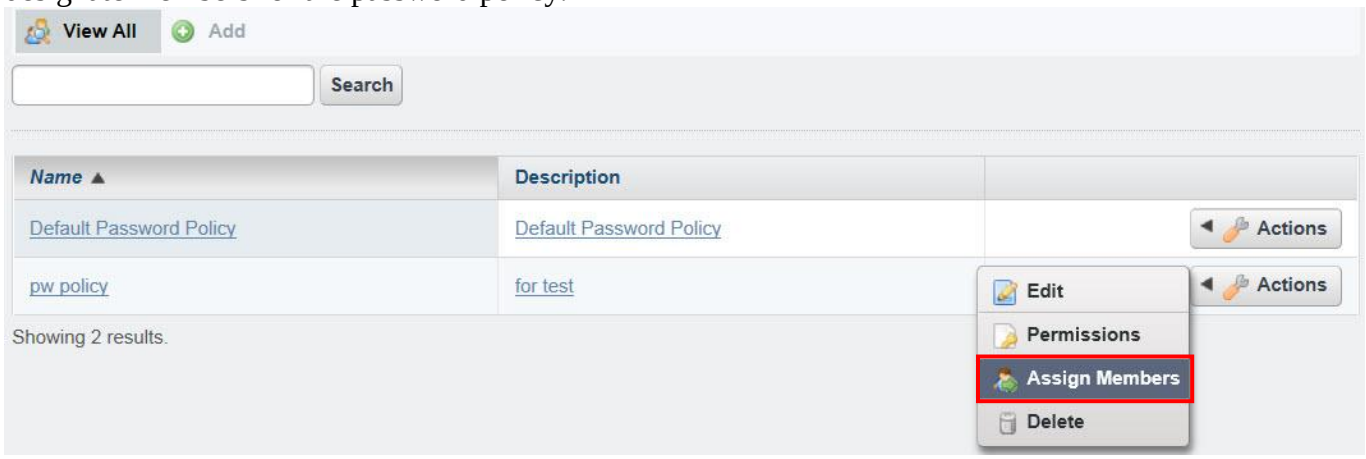


Permission setting:

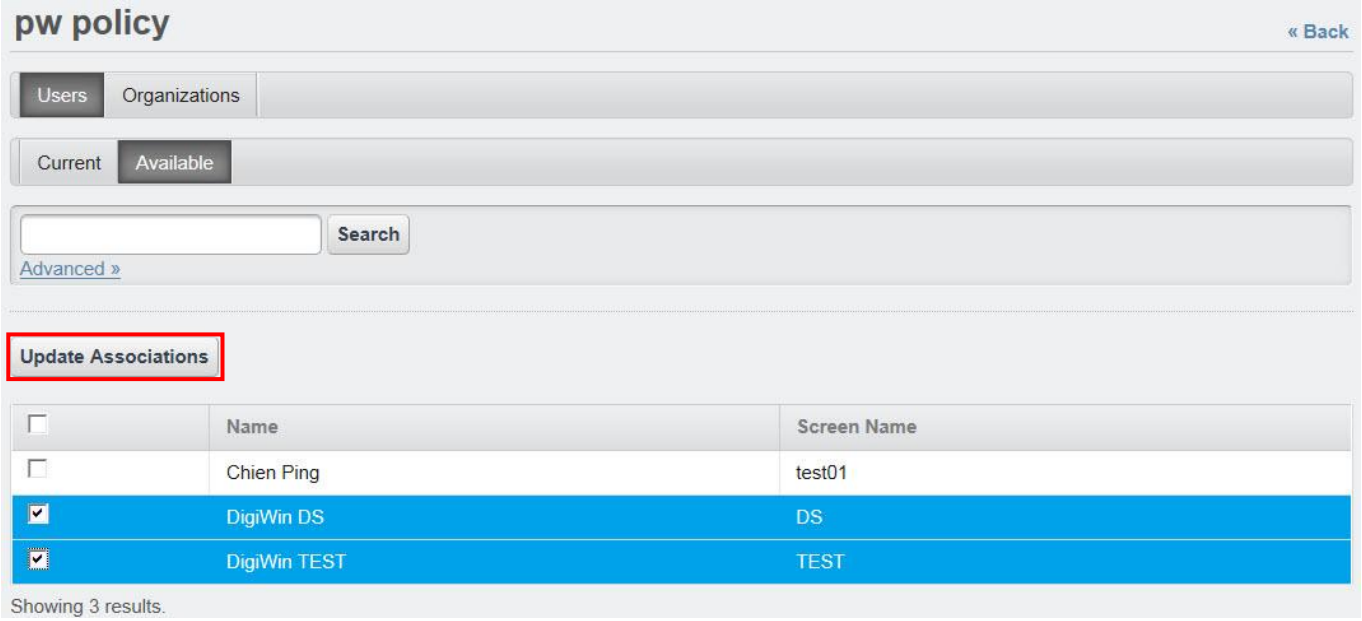
Data entity	Password policy
Permitted to	Delete, Update, Permissions, View, Assign Members

9.3.6.7 Assign Password Policy Member

Click “Actions” on the right of “Password policy” data entry and then select “Assign Members” to designate members for the password policy.



After accessing the setting page, check the user designated for the password policy and click “Update Associations”.

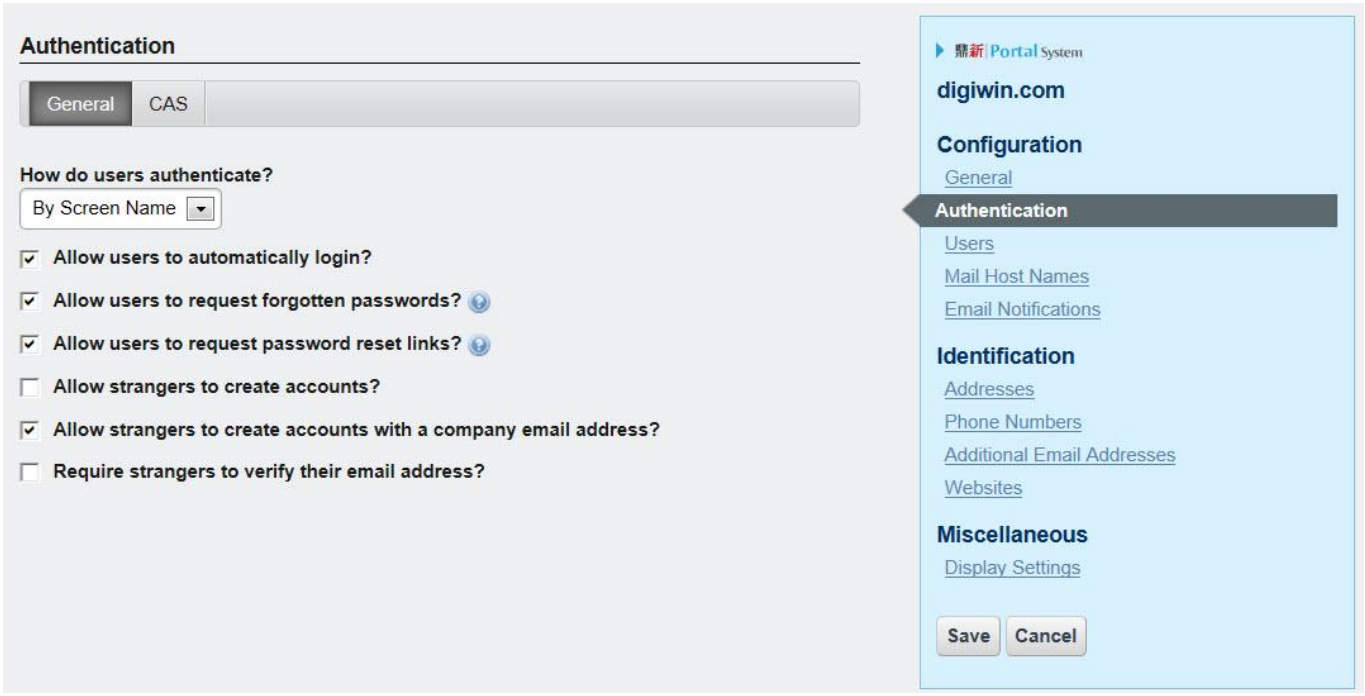


9.3.7 Portal Setting

9.3.7.1 Authentication

This feature enables the administrator to set login credential parameters.

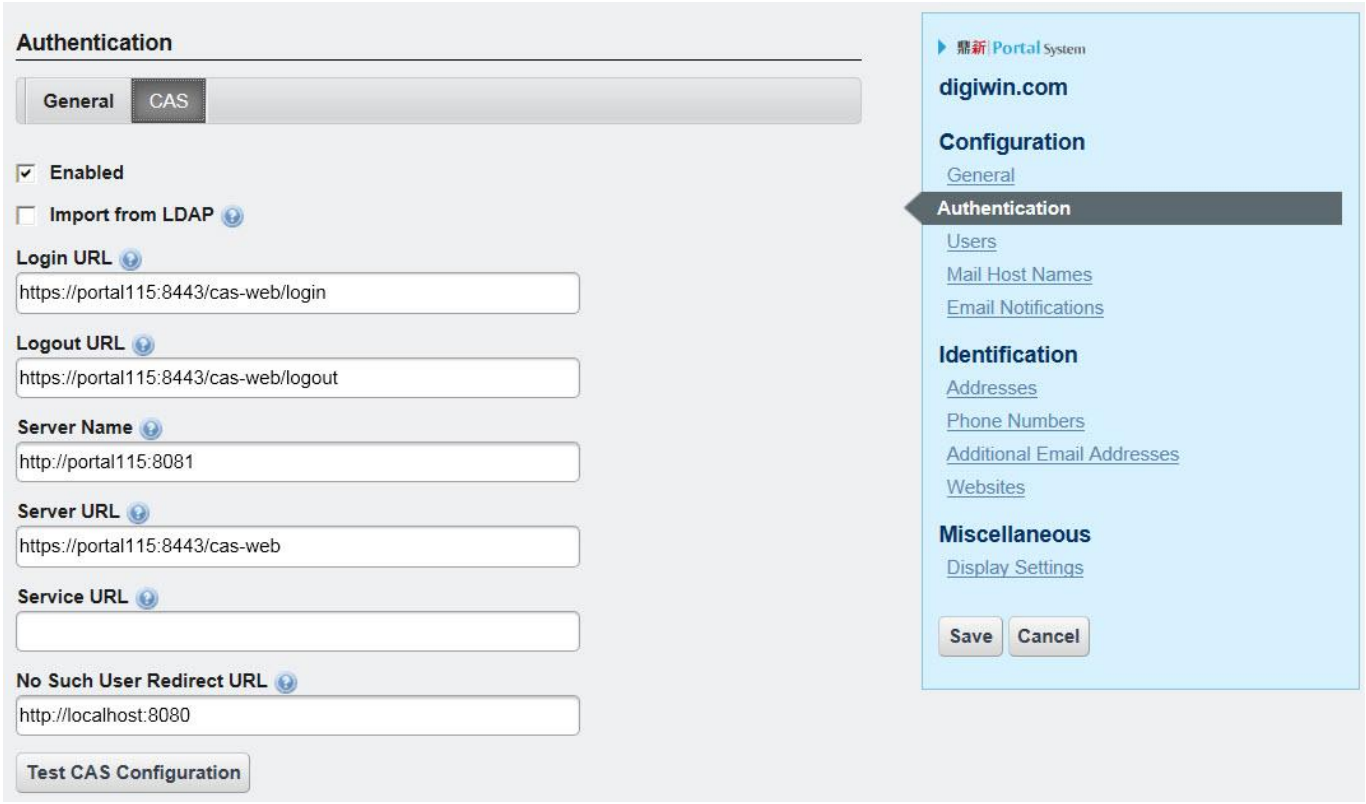
- General:



  - How do users authenticate: (By Email Address/ By Screen Name/ By User ID)

- Allow users to automatically login
- Allow users to request forgotten passwords: If this is checked, then users can request to have a new password sent to to their email address.
- Allow strangers to create accounts: If this is checked, then users can request to have a password reset link sent to their email address.
- Allow strangers to create accounts with a company email address
- Require strangers to verify their email address

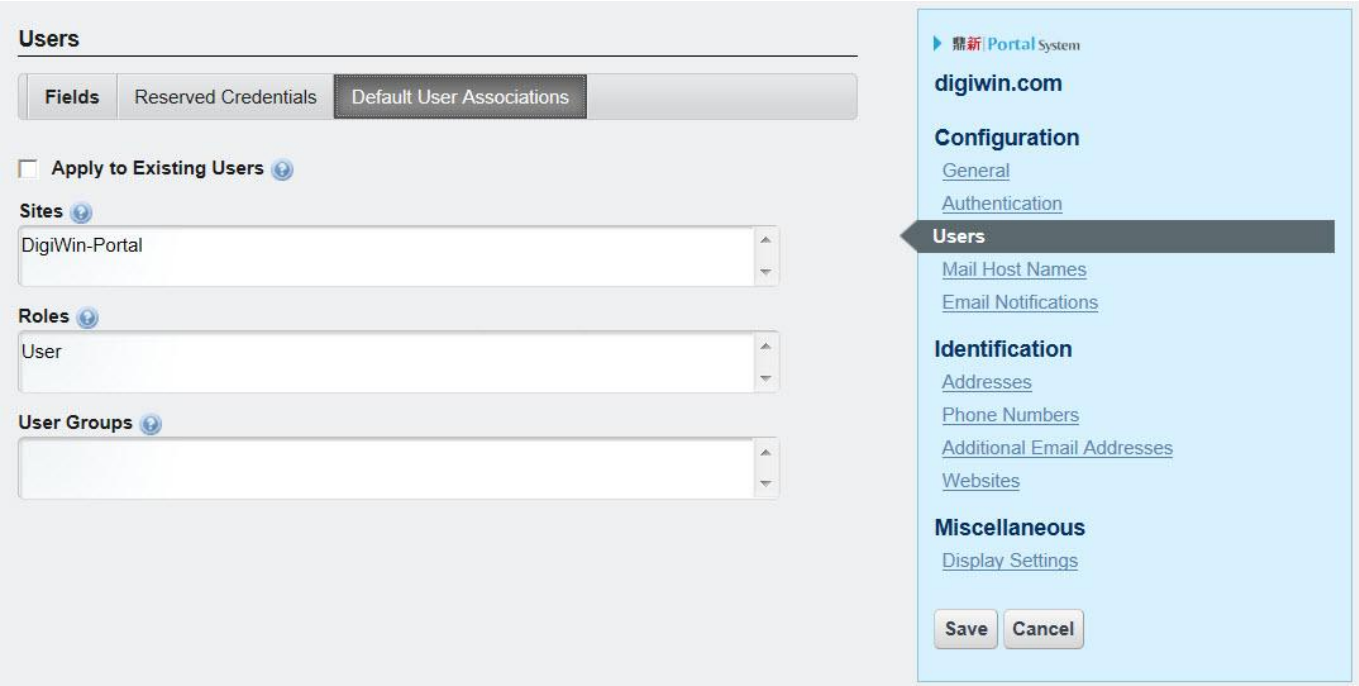
- CAS: Set CAS SSO credential parameters, which are automatically set by Portal. Any change by the administrator is not recommended.



- Enabled
- Import from LDAP: If this is checked, then users authenticated from CAS that do not exist in the portal will be imported from LDAP. LDAP must be enabled
- Login URL: Set the CAS server login URL. Users will be redirected to the CAS login page when authenticating into the portal
- Logout URL: Set the CAS server logout URL. Set this if you want the portal's logout function to trigger a CAS logout
- Server Name: Set this to enable deep linking into the portal (e.g. http://localhost:8080). Do not set this if the CAS service URL is set
- Server URL: Set the CAS server domain URL.
- Service URL: Set this to disable deep linking into the portal (e.g.http://localhost:8080/c/portal/login). Do not set this if the CAS server name is set.
- No Such User Redirect URL: Set the URL to redirect a user to, if the user can authenticate with CAS but cannot be found in the portal. If import from LDAP is enabled, then the user will be redirected if he cannot be found or could not be imported from LDAP

9.3.7.2 Default User Association

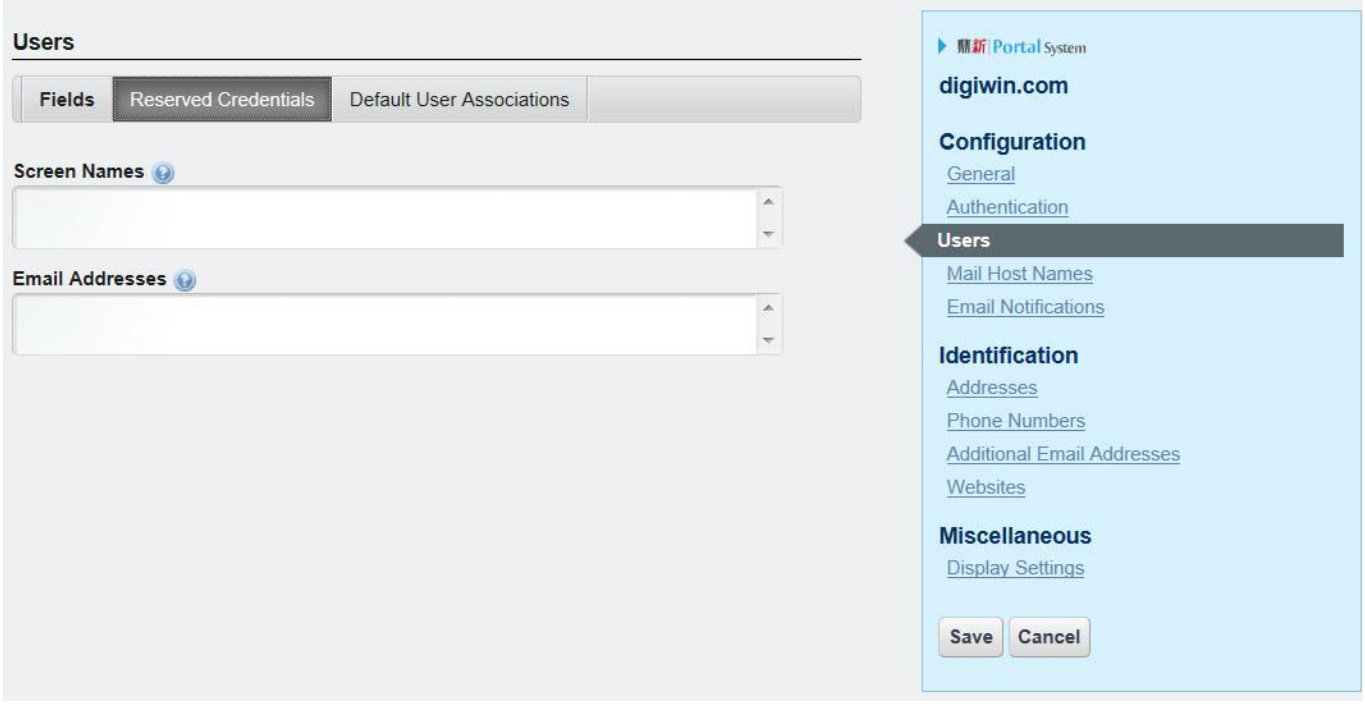
This feature enables the administrator to automatically associate a newly created user with designated community, role and user group.



- Apply to Existing Users: Check to apply the changes to existing users. Changes take effect the next time a user signs in.
- Site: Set the site which a newly created user automatically joins. Several sites can be set and only one site may be entered in each line
- Roles: Set the role which a newly created user automatically plays. Several roles can be set and only one role may be entered in each line
- User Groups: Set the user group which a newly created user automatically joins. Several user groups can be set and only one user group may be entered in each line

9.3.7.3 Reserved Credentials

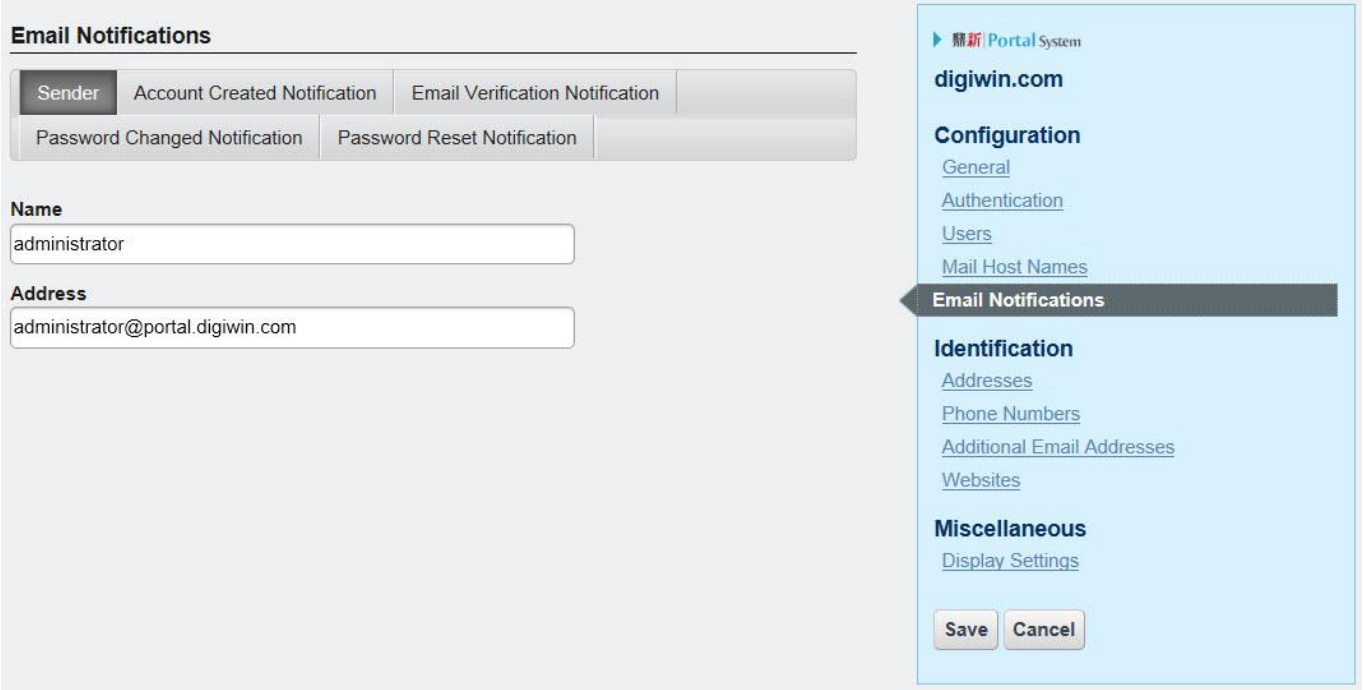
This feature enables the administrator to set “Reserved Credentials”. While a user is being created, reserved account name and E-mail may not be used.



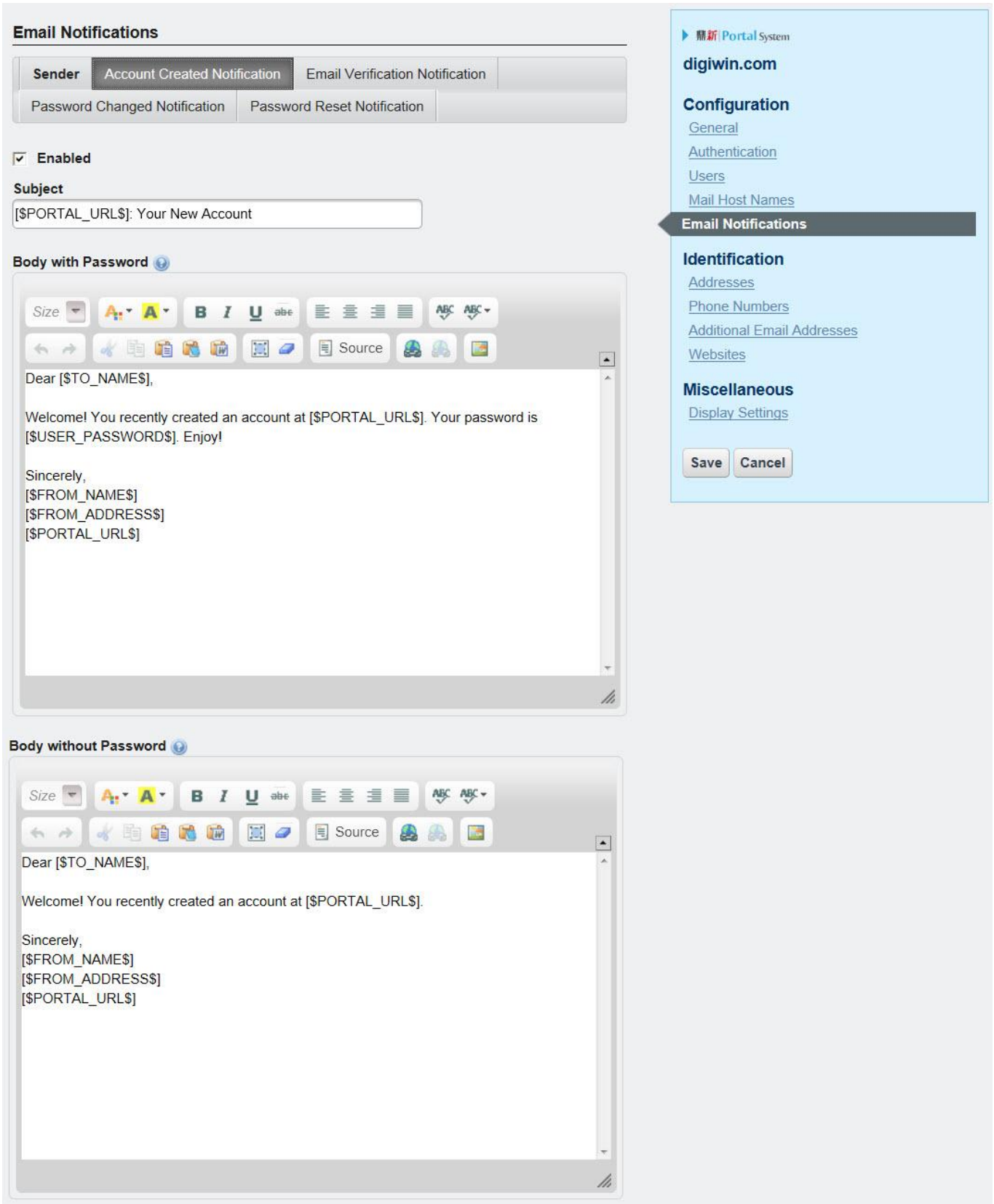
- Screen Names: Set the name of account to be reserved. Several names can be set and only one name may be entered in each line
- Email Addresses: Set the E-mail to be reserved. Several Email Addresses can be set and only one Email Address may be entered in each line

9.3.7.4 Email Notifications

This feature enables the administrator to make settings on system E-mails.

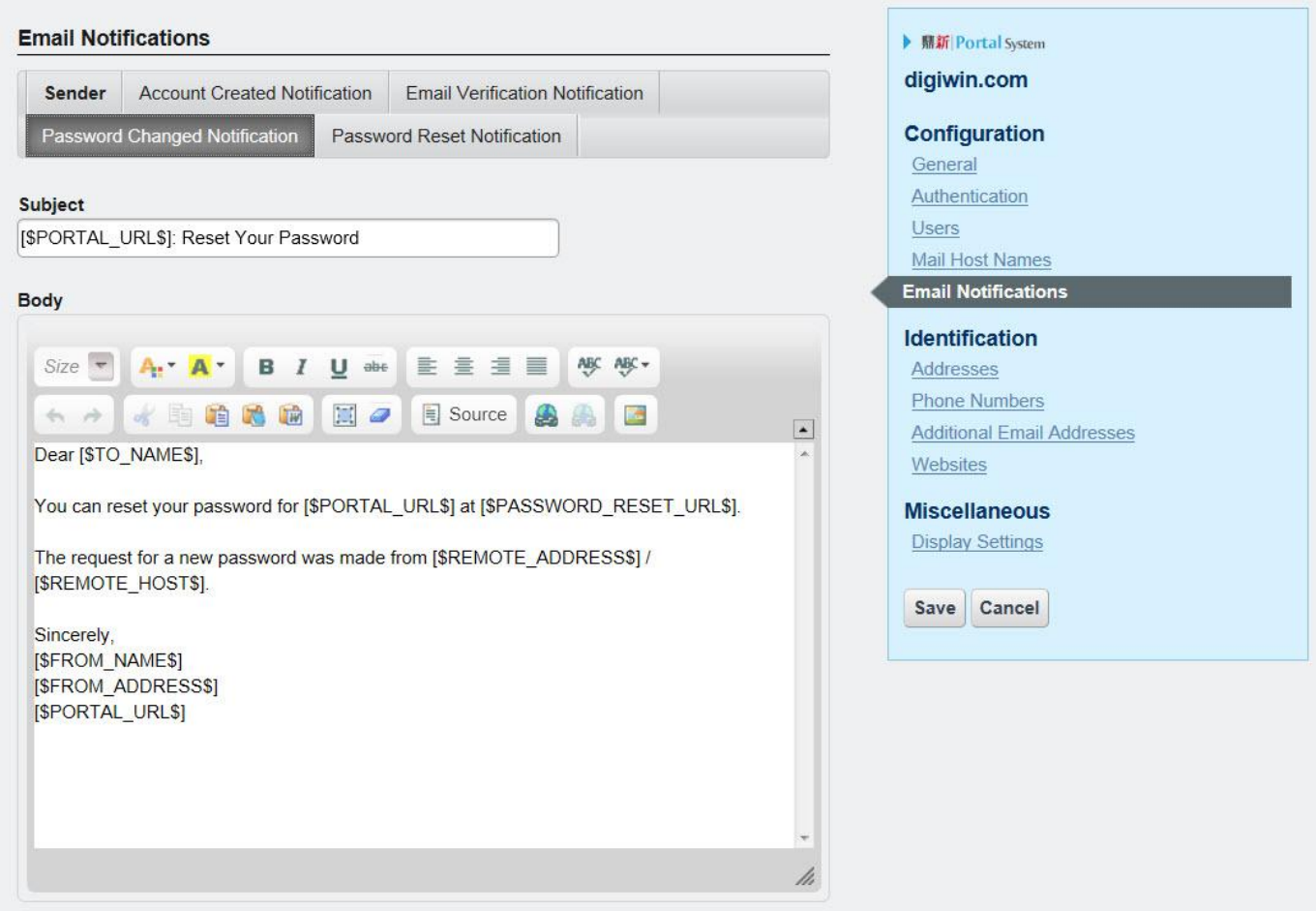


- Sender: Set the information of the sender
  - Name: Enter the name of the sender
  - Address: Enter E-mail address of the sender



- Account creation notification: Set the content of notification E-mail for account creation

- Enabled: Check it for the system to send E-mail notification after successful account creation
- Subject: Enter the subject of notification E-mail for account creation
- Body with Password: Enter the body of the email sent to users upon registration. This should contain the user's automatically generated password
- Body without Password: Enter the body of the email sent to users upon registration. This will not contain the user's password



- Password change notification: Set the content of notification E-mail for password change
  - Subject: Set the subject of notification E-mail for password change
  - Body: Set the content of notification E-mail for password change

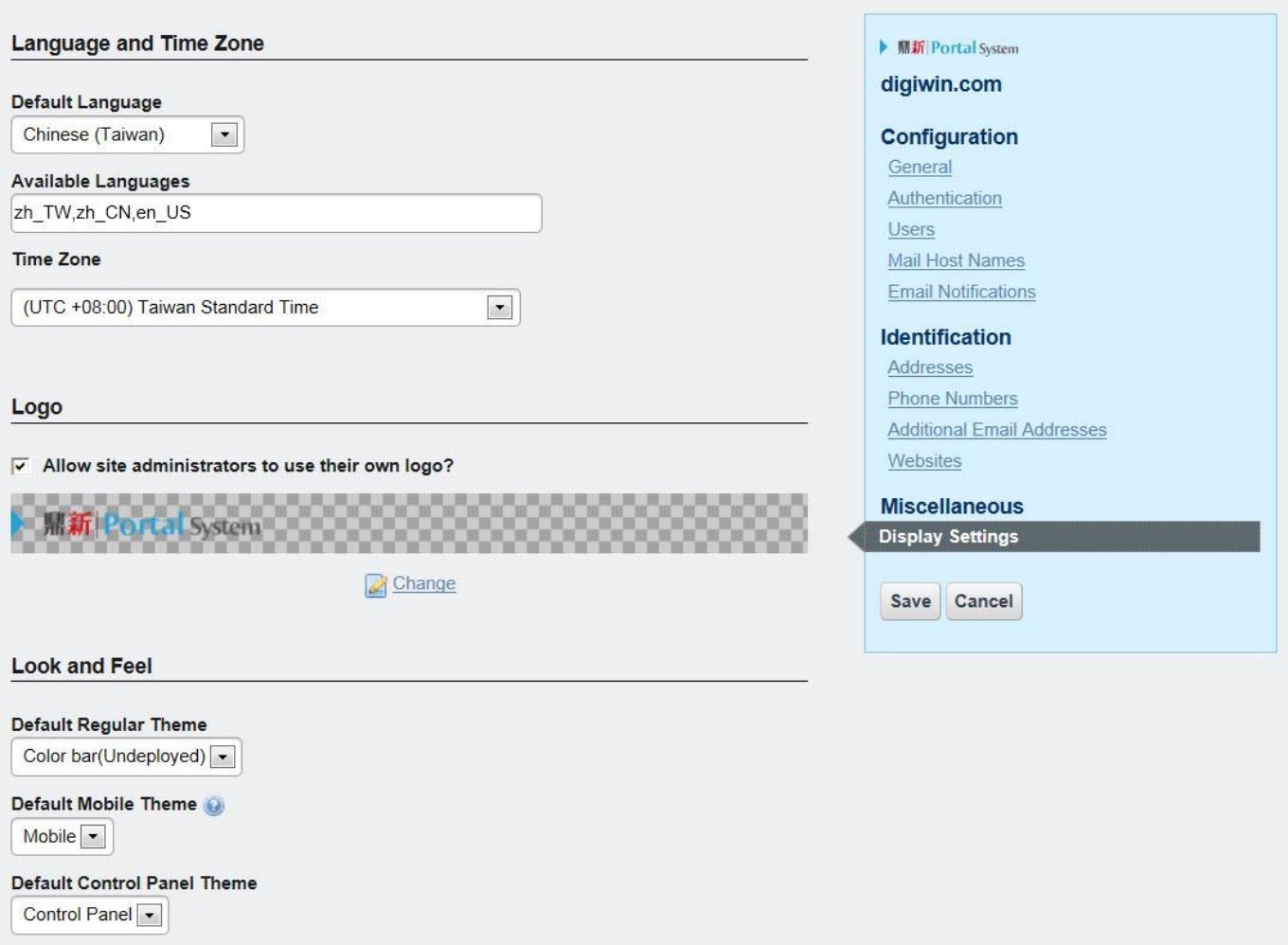
Tips [$…$] in subject and content is a specific parameter and will be replaced with actual content while the E-mail is being sent. Parameters are described below:

Parameter	Description
FROM_ADDRESS	Sender’s E-mail
FROM_NAME	Sender’s name
PORTAL_URL	Portal host address
REMOTE_ADDRESS	Remote address of the explorer

REMOTE_HOST	Remote host of the explorer
TO_ADDRESS	Address of E-mail recipient
TO_NAME	Name of E-mail recipient
USER_AGENT	Remote user agent of the explorer
USER_ID	User's ID
USER_PASSWORD	User's password
USER_SCREENNAME	User account

9.3.7.5 Display Setting

This feature enables the administrator to set the system's default language, time zone and Logo icon.



- Default Language: Select the system's default language. Languages currently available: Chinese (Taiwan), Chinese (China), English
- Available Languages:
- Time zone: Select the system's default time zone
- Allow community administrators to use their own Logo:
- Logo: Press "Change" to upload Logo picture file
- Optimal display of Logo: 140*45 (maximum support: 500*45 pixels) background-removed picture file (gif, png…)

- Default Regular Theme
- Default Mobile Theme: Mobile themes only apply to WAP devices.
- Default Control Panel Theme

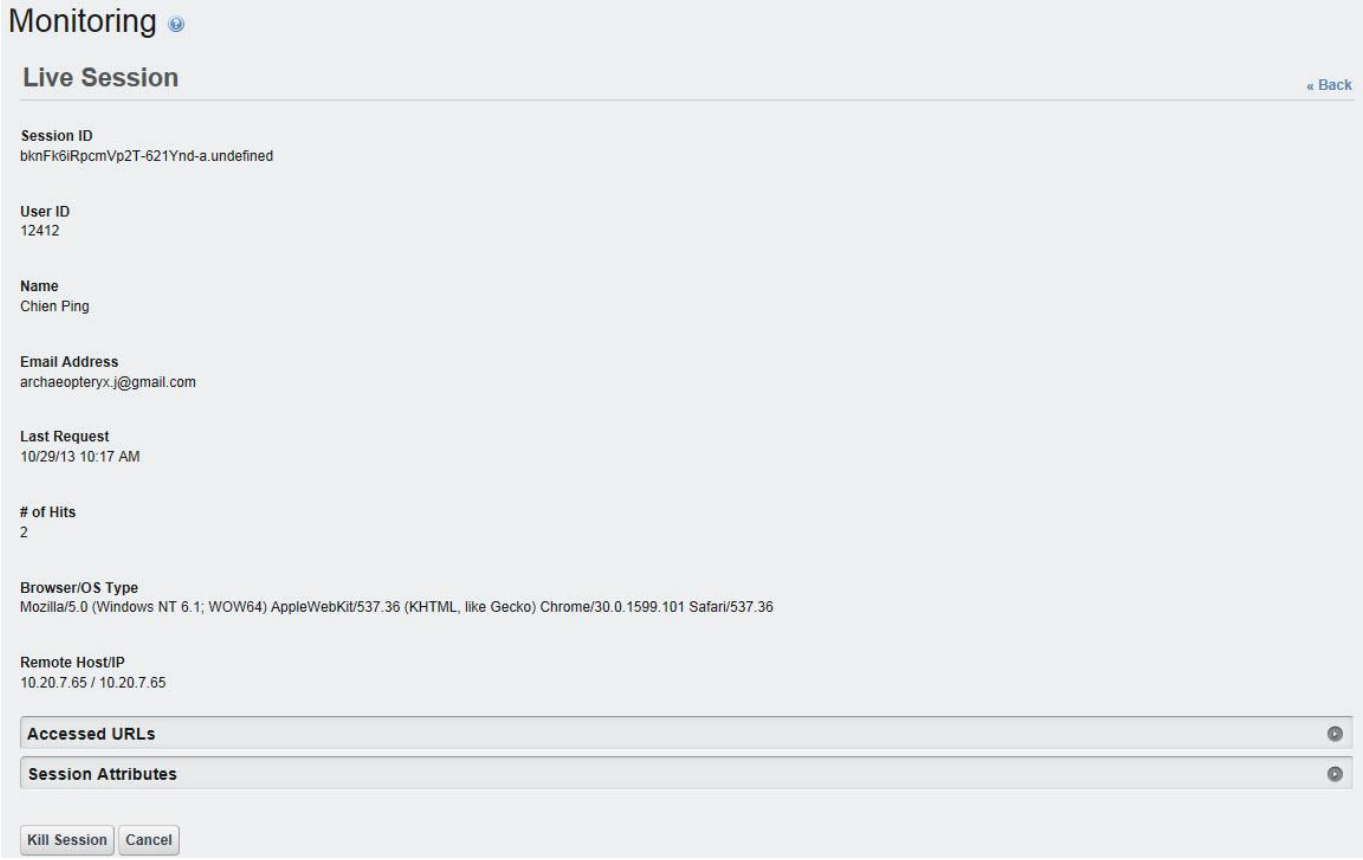
9.3.8 Monitoring

This feature enables the administrator to view and manage the record of browsing Portal pages.

9.3.8.1 View Live Sessions

View the list of currently online users in Portal, the time of their most recent link to the webpage and the number of hits.

Click any link to view activity history (access URL).



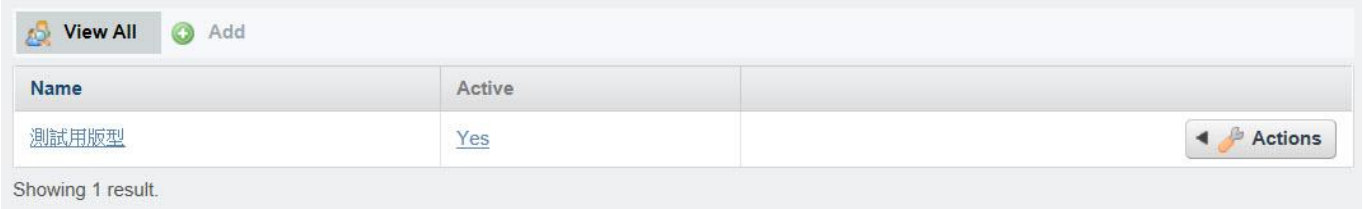
Press “Kill Session” to forcibly suspend Session, and the user will be immediately logged out.

9.3.9 Site Templates

Site Templates allow you to define pages and web content to include when creating sites. Administrators may define and edit site templates as well as their permissions.

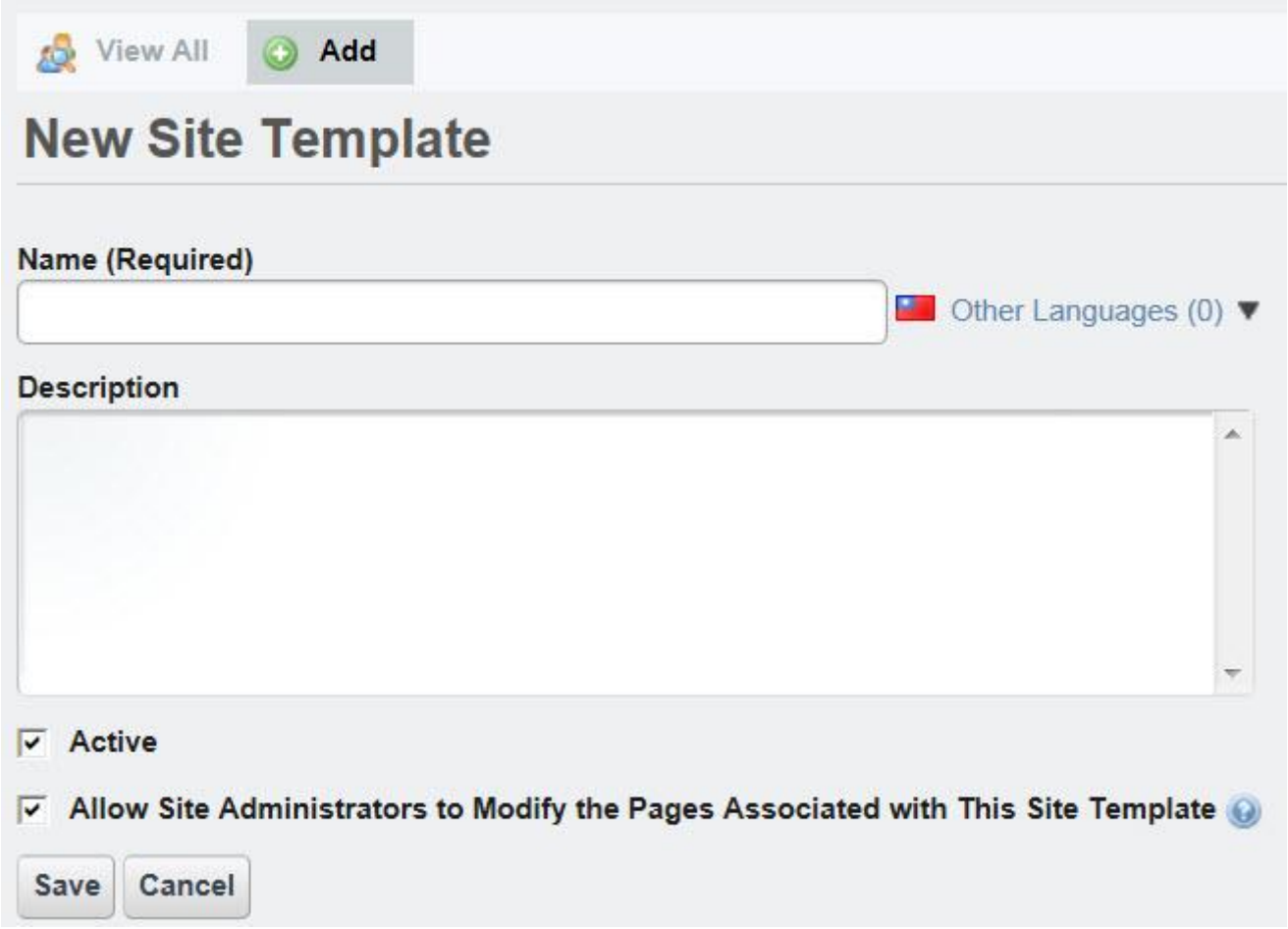
9.3.9.1 View Site Templates

Press “View All” to view all created site templates.



9.3.9.2 Add Site Template

Press “Add” to create a new site template.

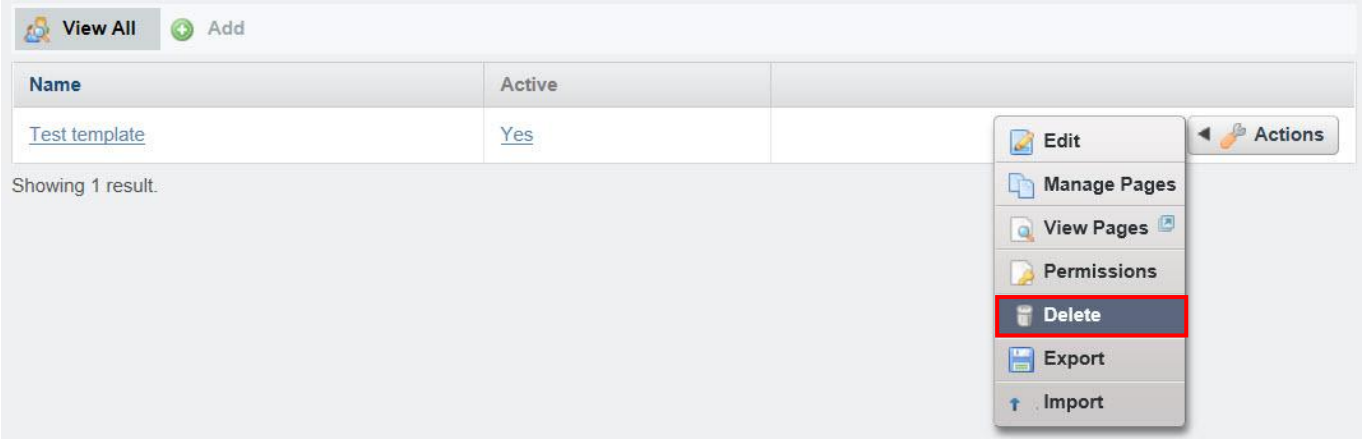


- Name: Enter the name of site template
- Description: Enter the description of site template
- Active: Enable the site template
- Allow Site Administrators to Modify the Pages Associated with This Site Template: Set this to allow site administrators to add, remove, or configure applications and change page properties. If site administrators modify a page, changes to the original site template page are no longer propagated. If

this option is set, it is possible to disallow modifications from specific pages through the page management tool

9.3.9.3 Delete Site Template

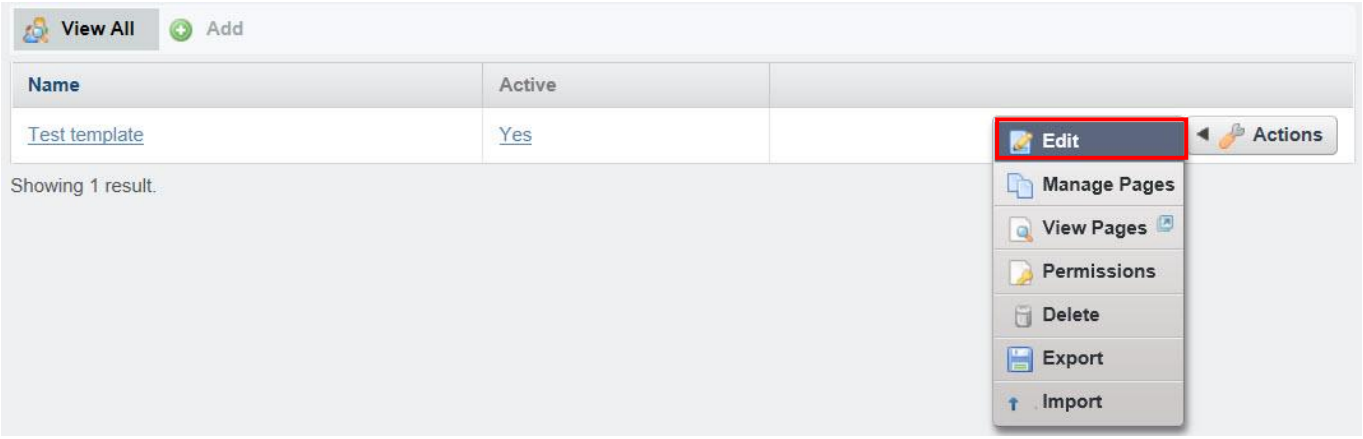
Click “Actions” on the right of “Site Templates” data entry to be deleted and then select “Delete”.

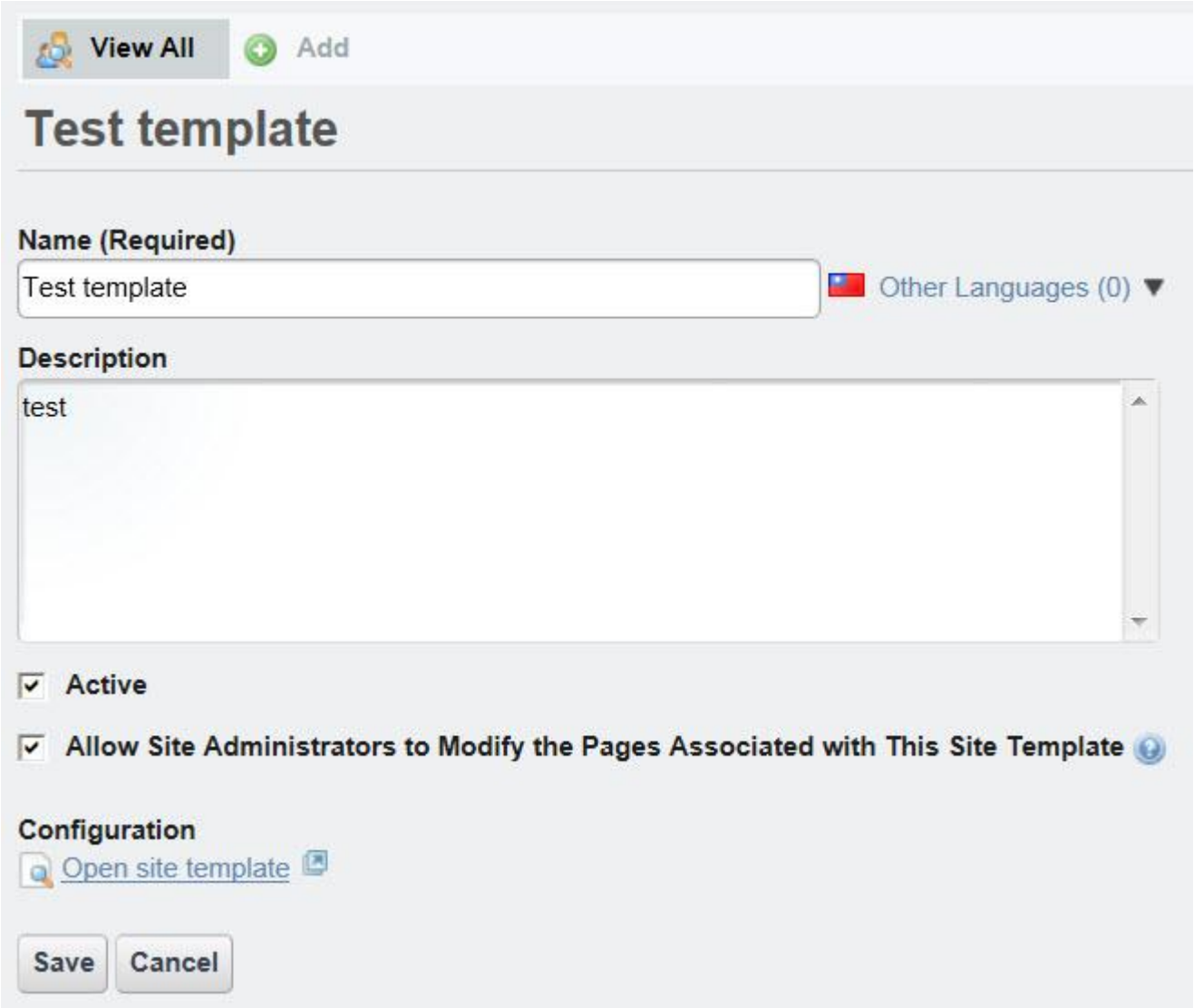


Tips If the site template has been used, deletion is prohibited.

9.3.9.4 Edit Site Template

Click “Actions” on the right of “Site Templates” data entry and then select “Edit” to access edit page.

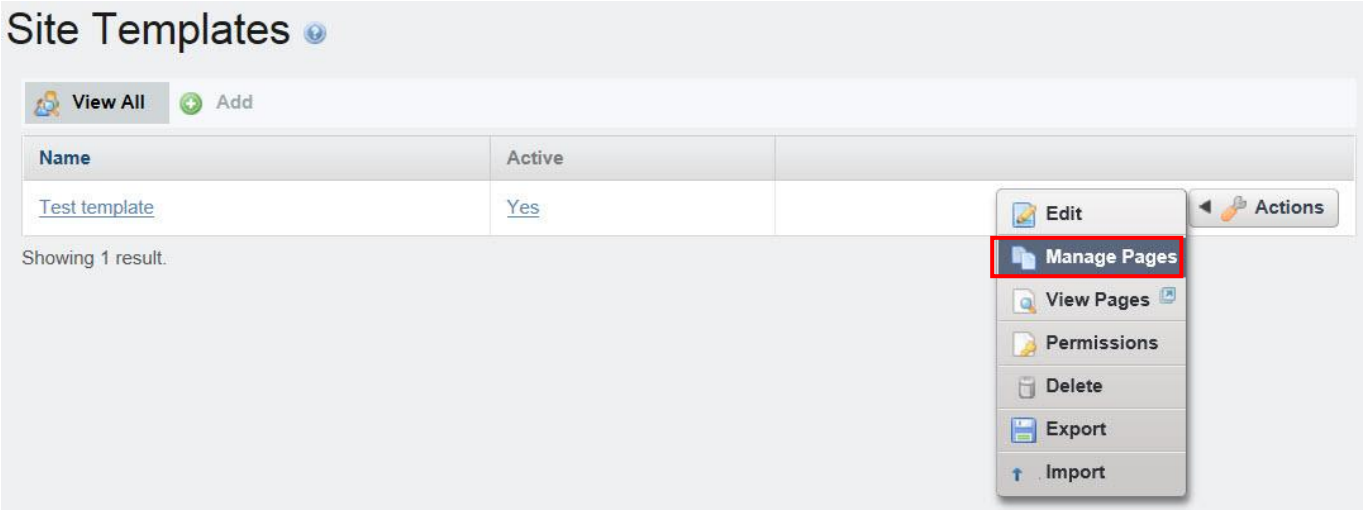




- Configuration: Click “Open site template”, user can access edit page to edit the site pages by opening a new window page
- For site template data, please refer to the foregoing “Add Site Template” section.

9.3.9.5 Manage Site Page

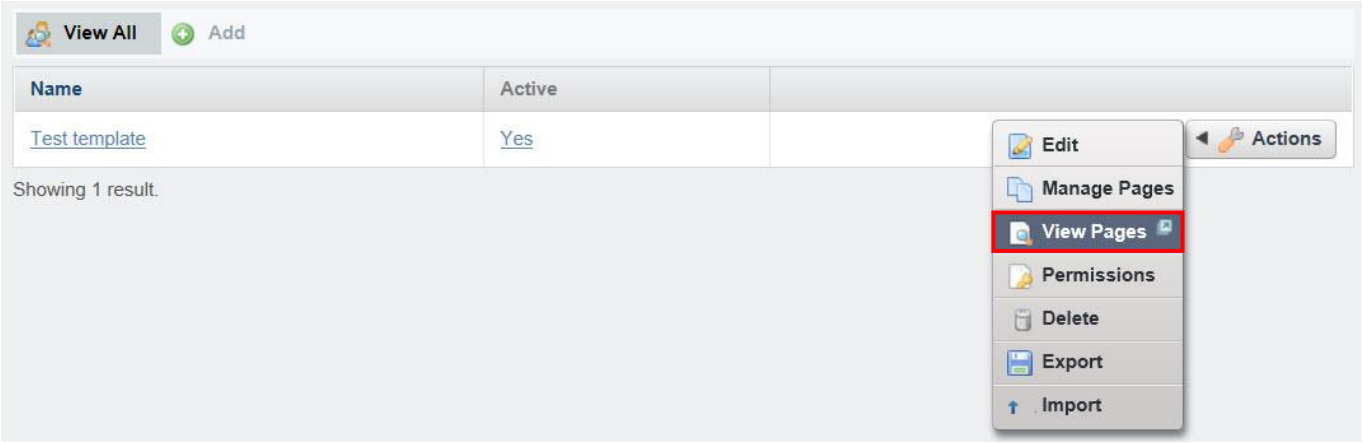
Click “Actions” on the right of “Site Templates” data entry and then select “Manage Pages”.



For page management method, please refer to “Management Page” section in “Start using DigiWin Portal”.

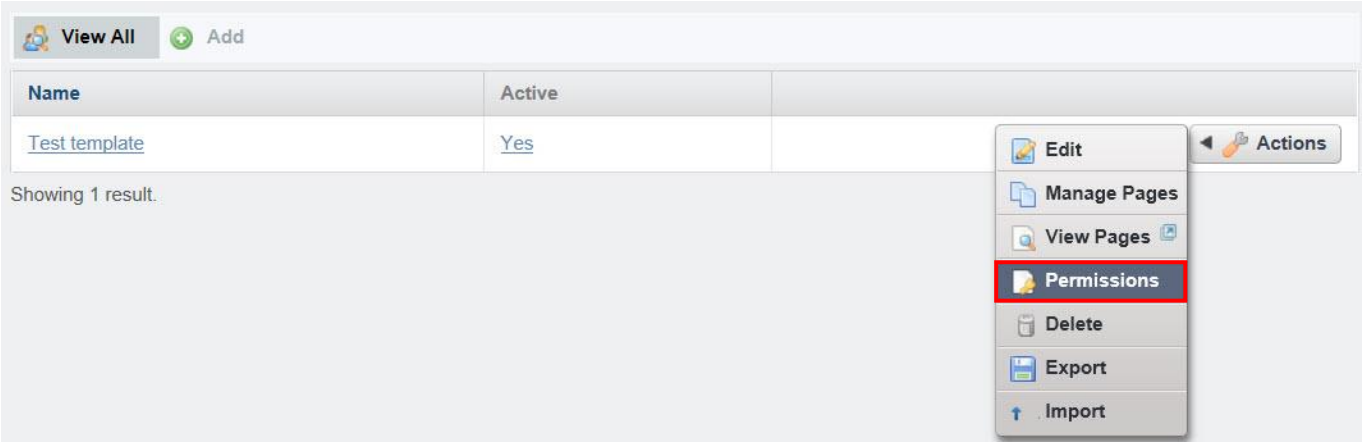
9.3.9.6 View Site page

Click “Actions” on the right of “Site Templates” data entry and then select “View Pages” to view the new page which applies the site template.



9.3.9.7 Site Template Permission Setting

Click “Actions” on the right of “Site Templates” data entry and then select “Permissions” to access the permission setting page.



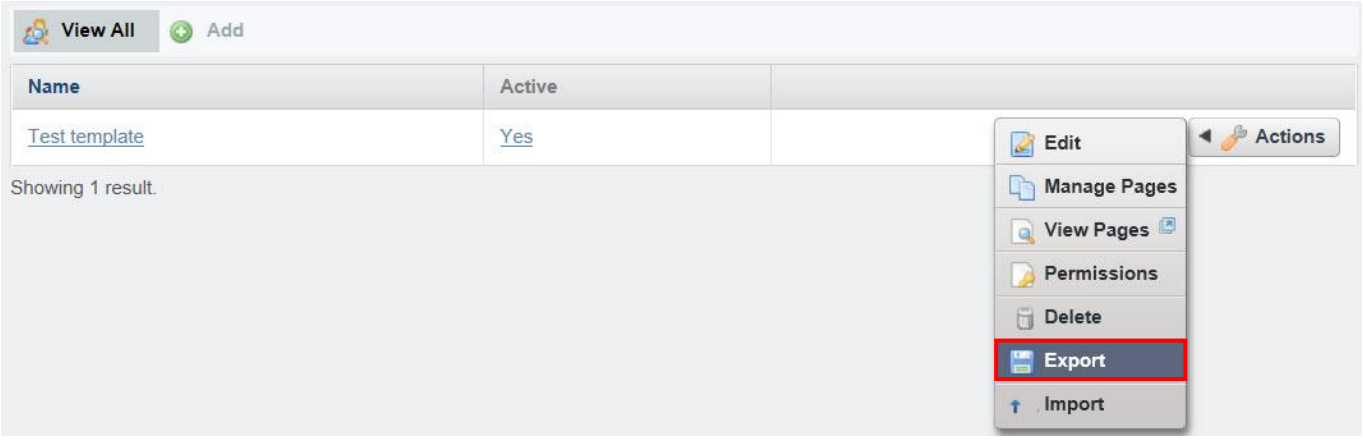
Permission setting:

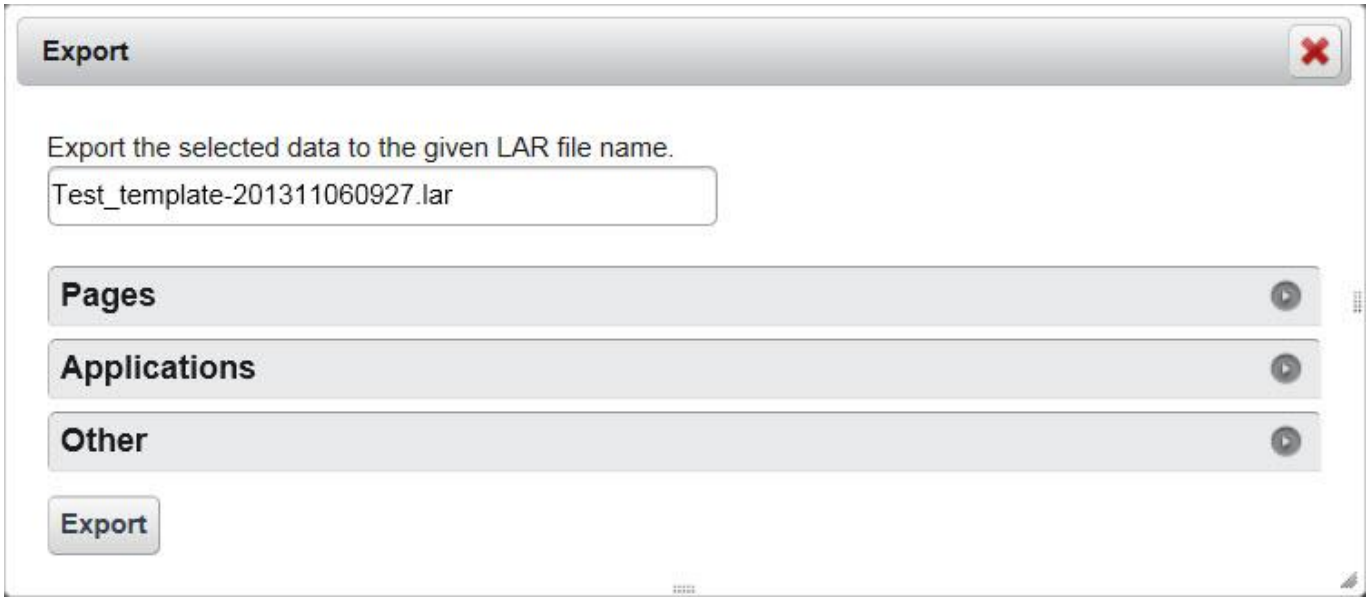
Data entity	Site Template
Permitted to	View, Permissions, Delete, Update

Tips The user who is using the site template could be given permissions.

9.3.9.8 Export Site Template

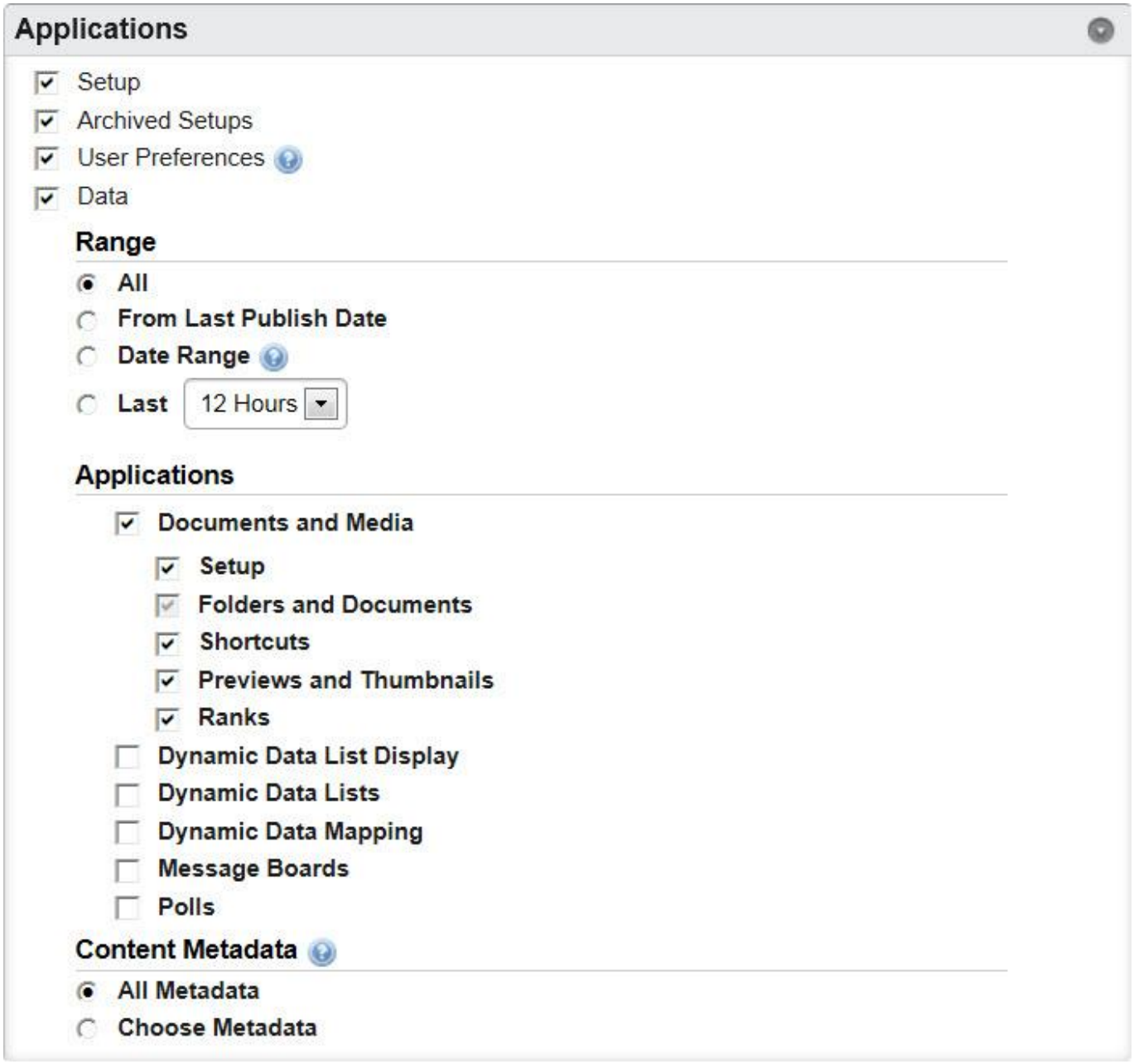
Click “Actions” on the right of “Site Templates” data entry and then select “Export” to export site template.



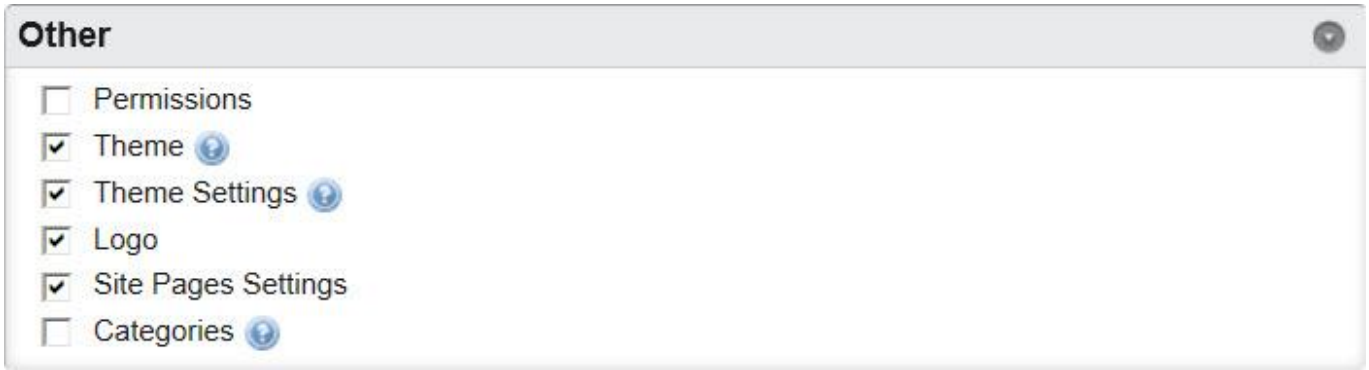


- Export the selected data to the given Lar file name: The default name of the exported site template is " name of the site template – export time(YYYYMMDDHHMMSS) " and filename extension is .lar
- user could determine settings of exported site template in few parts: pages, applications, other

- Pages is checked by default, user can not change



- There are four options could be checked to export: setup, archived setups, user preferences and data

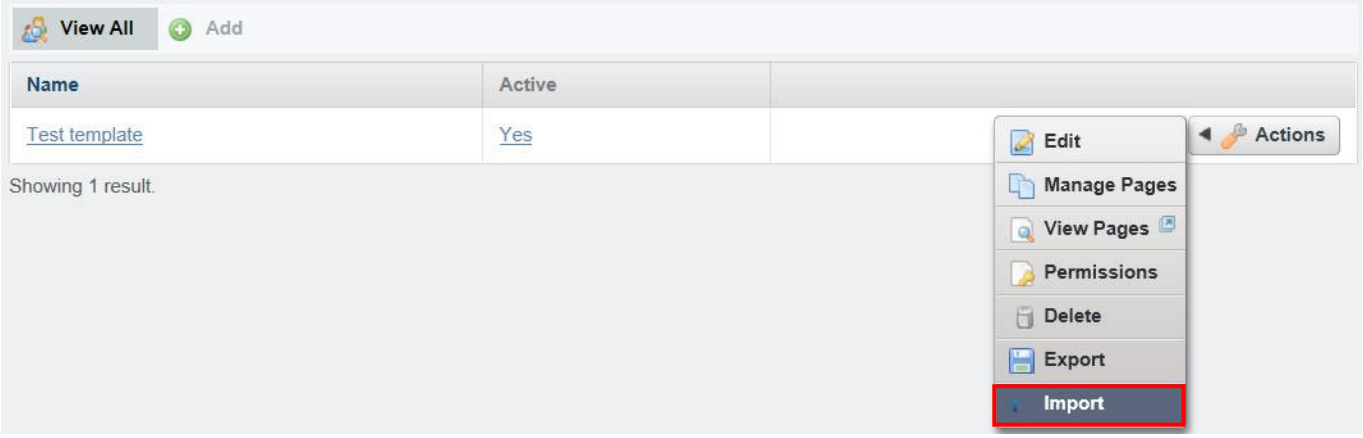


- Theme: When selected on export, the top level theme and all of its files will be included in the resulting LAR files. When selected on import, the theme will be installed and all the pages will be configured to use it

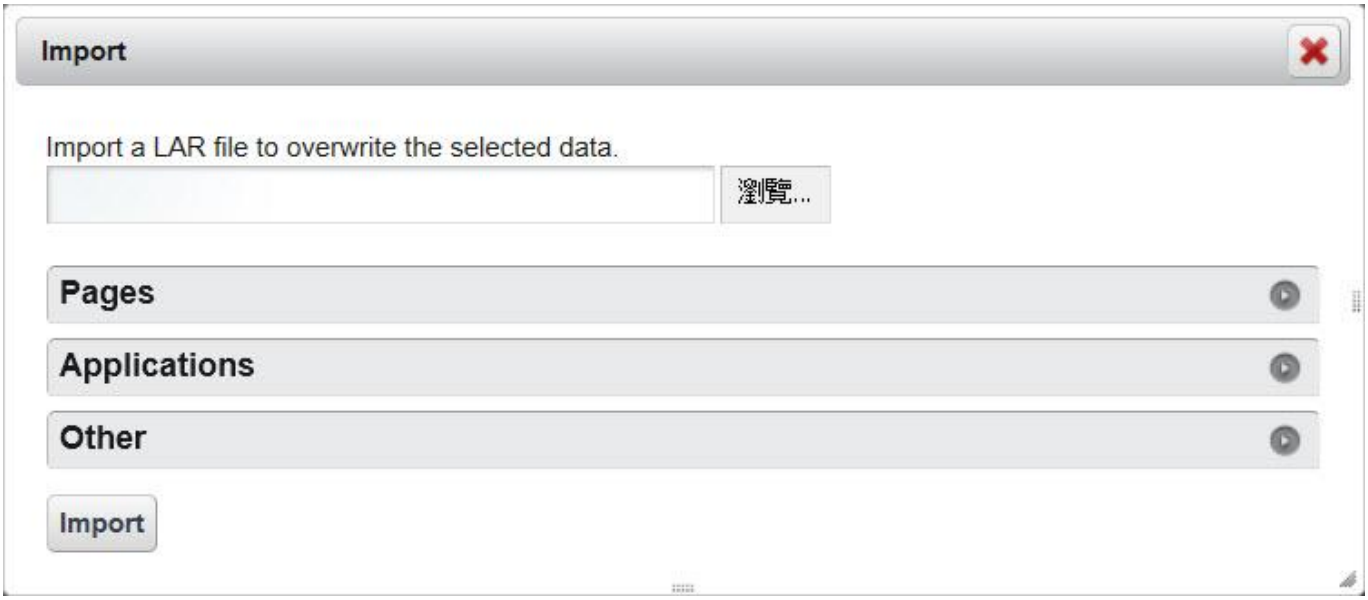
- Categories: When selected, all categories will be exported or imported, keeping their hierarchy. During import, duplicate categories will not be created if a category with same name already exists

9.3.9.9 Import Site Template

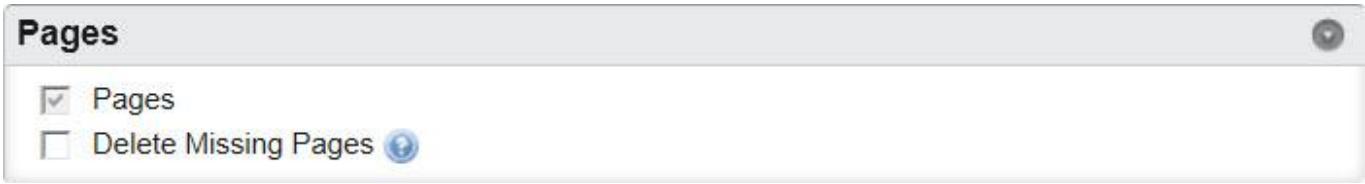
Click “Actions” on the right of “Site Templates” data entry and then select “Import” to import site template.



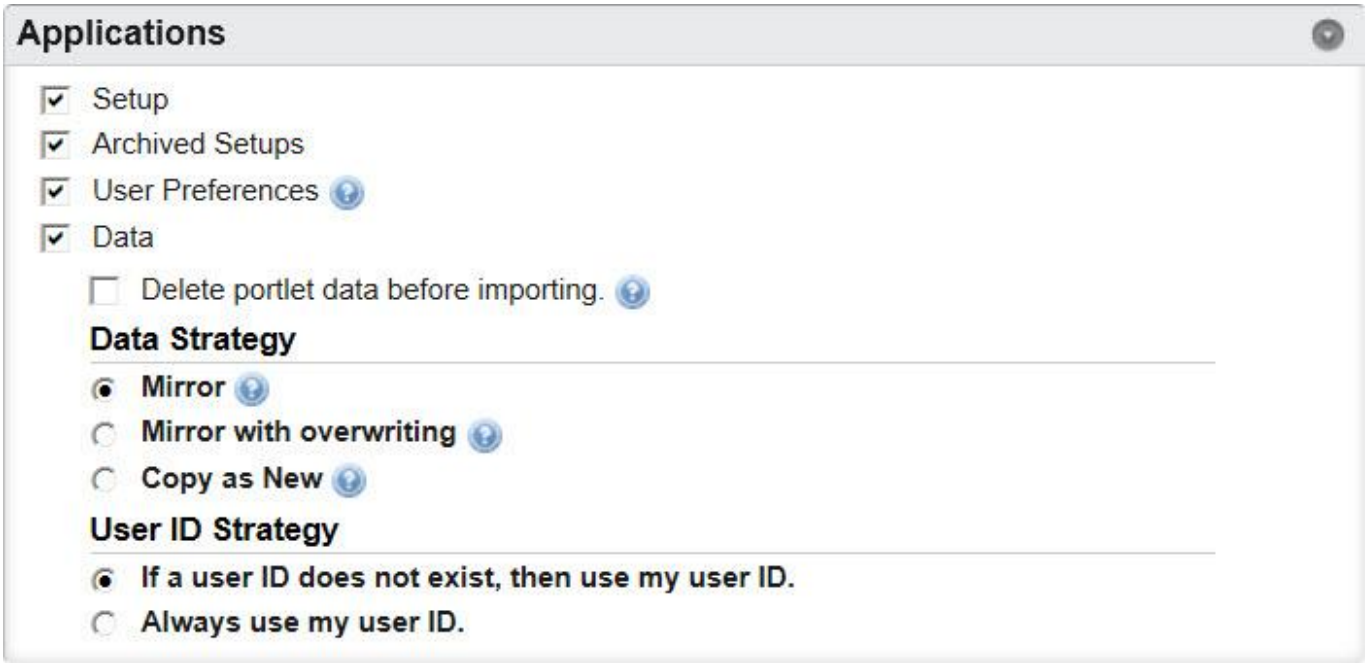
Click “瀏覽” to choose a file



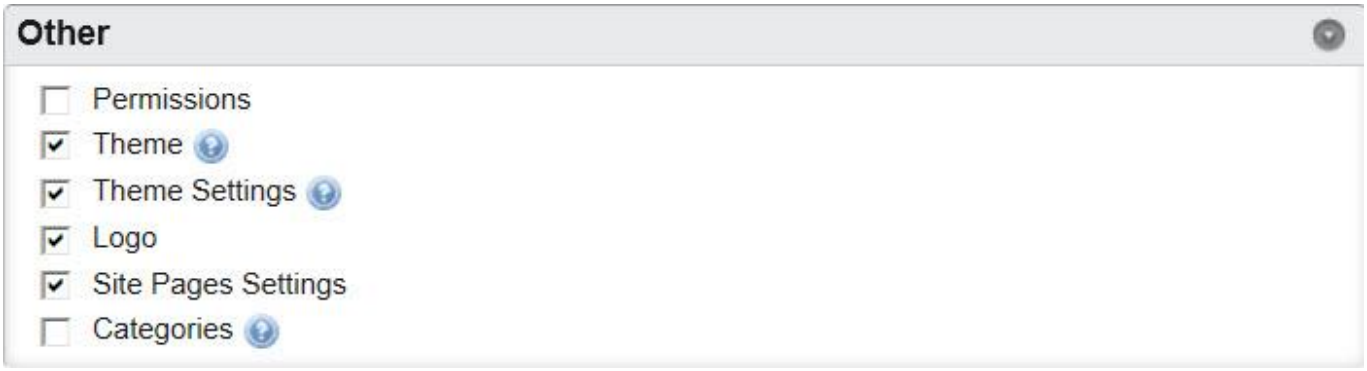
- user could determine settings of imported site template in few parts: pages, applications, other



- Pages is checked by default, user can not change
- If this option is chosen, all the pages in this site that are not present in the import LAR file will be deleted



- There are four options could be checked to import: setup, archived setups, user preferences and data



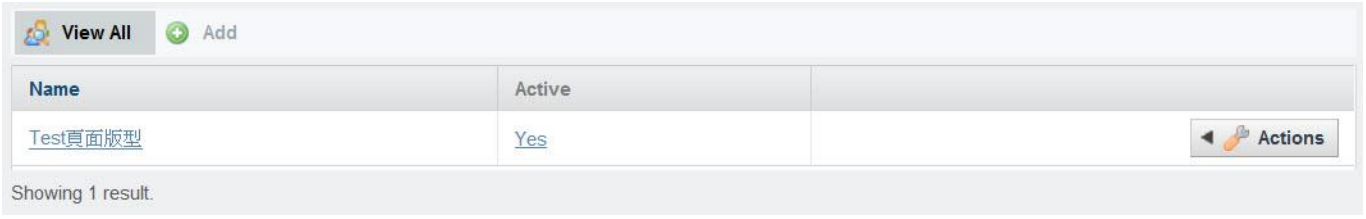
- Theme: When selected on export, the top level theme and all of its files will be included in the resulting LAR files. When selected on import, the theme will be installed and all the pages will be configured to use it
- Categories: When selected, all categories will be exported or imported, keeping their hierarchy. During import, duplicate categories will not be created if a category with same name already exists

9.3.10 Page Templates

Page Templates allow you to select a page to use and portlets to be included when creating a page. Administrators may define and edit page templates as well as their permissions. Or disable for all portlets.

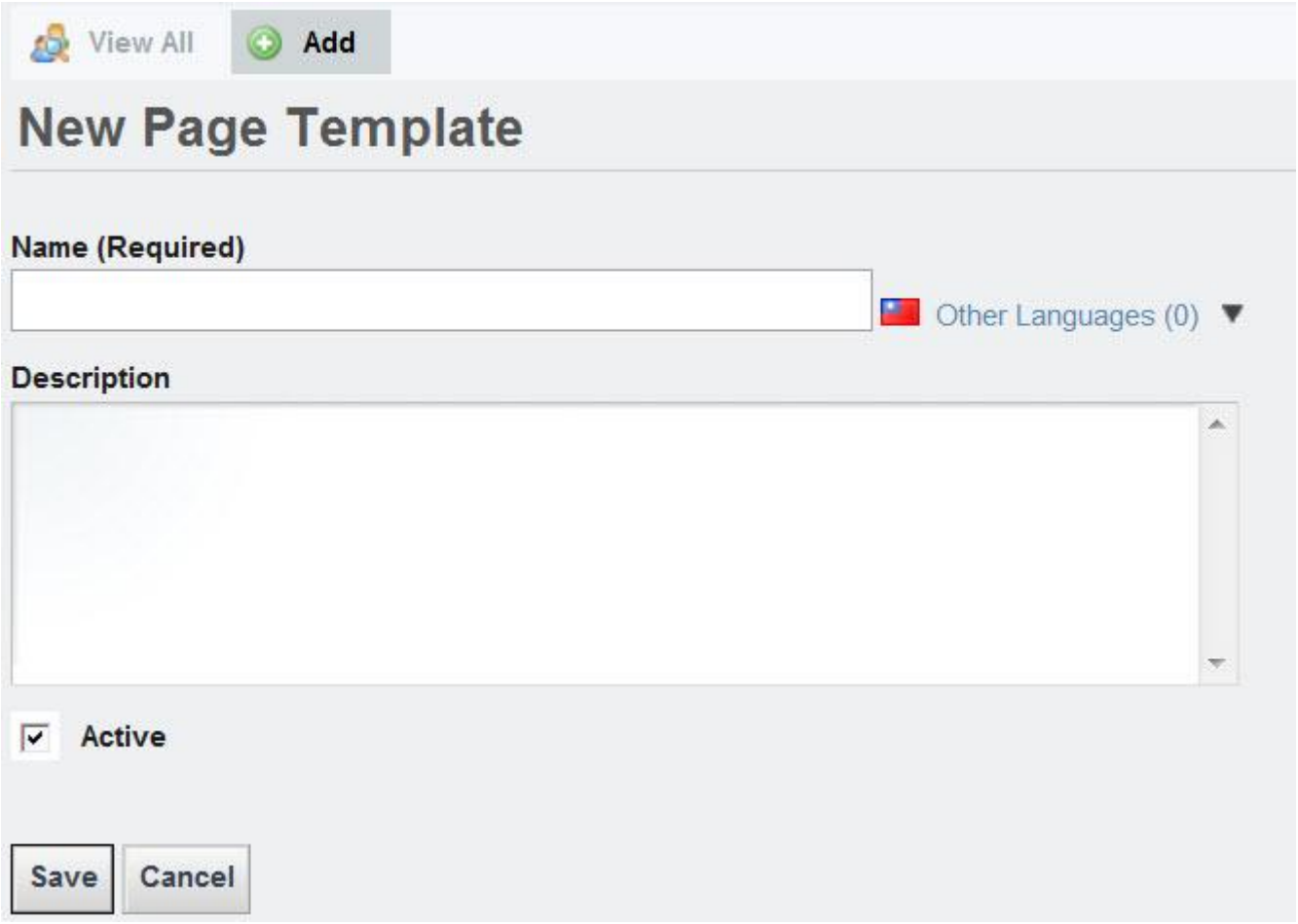
9.3.10.1 View Page Templates

Press “View All” to view all created page templates.



9.3.10.2 Add Page Template

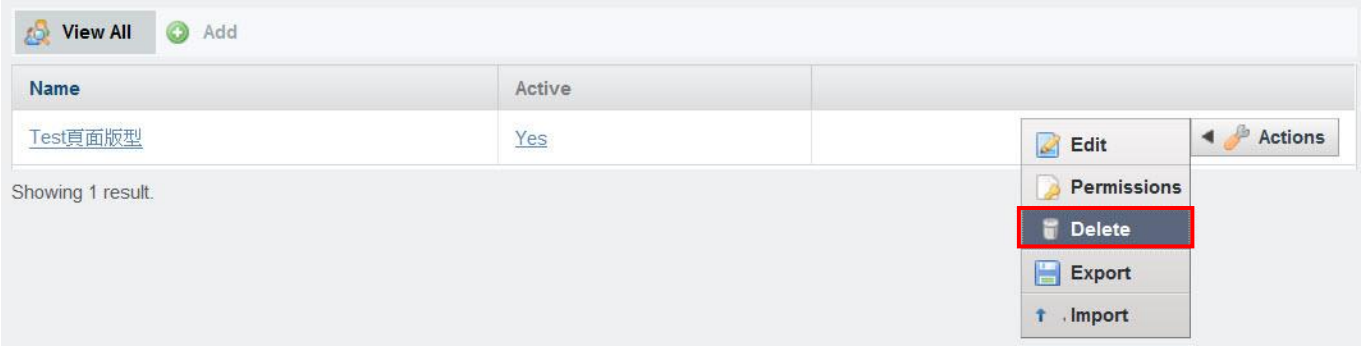
Press “Add” to create a new page template.



- Name: Enter the name of page template
- Description: Enter the description of page template
- Active: Enable the page template

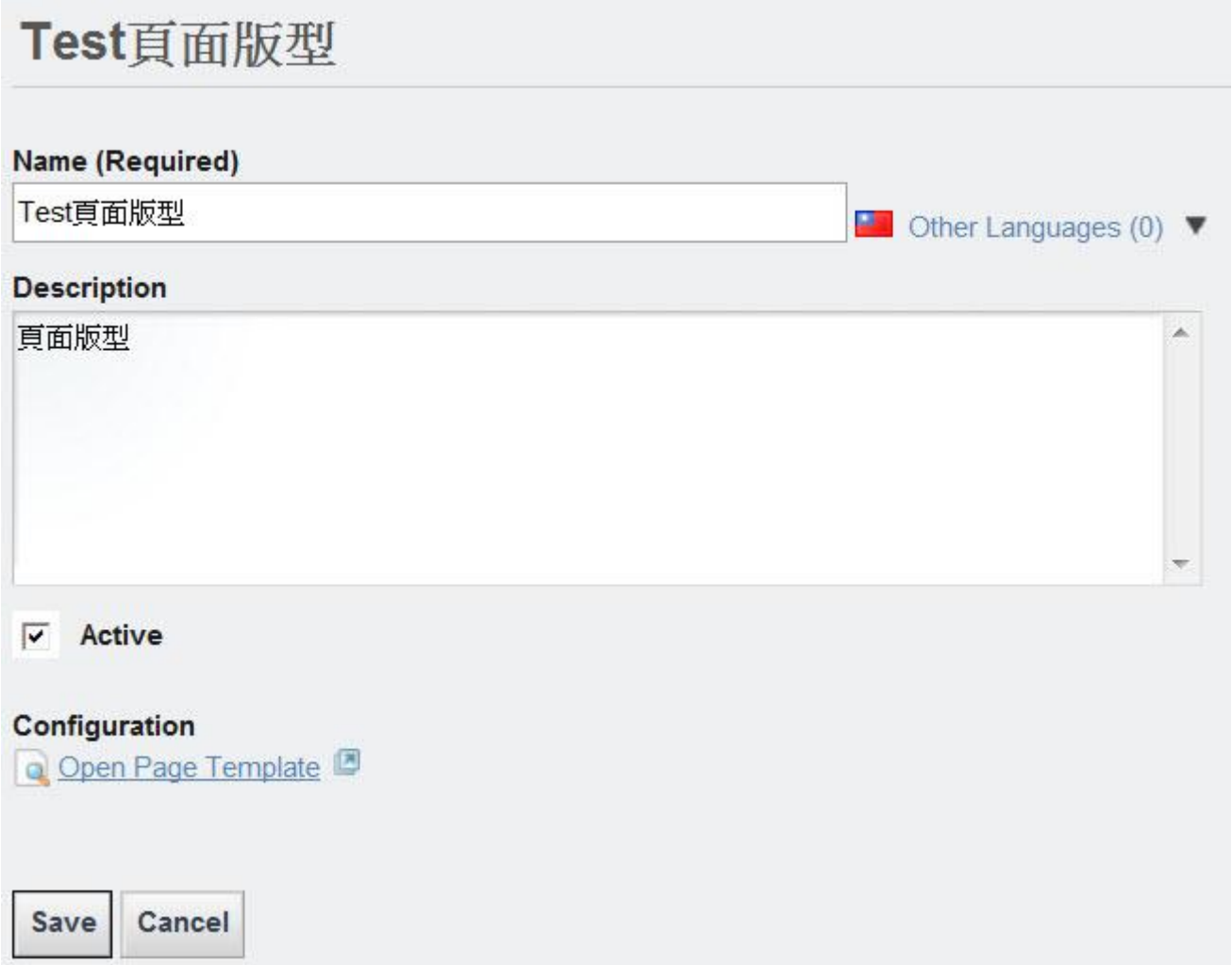
9.3.10.3 Delete Page Template

Click “Actions” on the right of “Page Templates” data entry to be deleted and then select “Delete”.



9.3.10.4 Edit Page Template

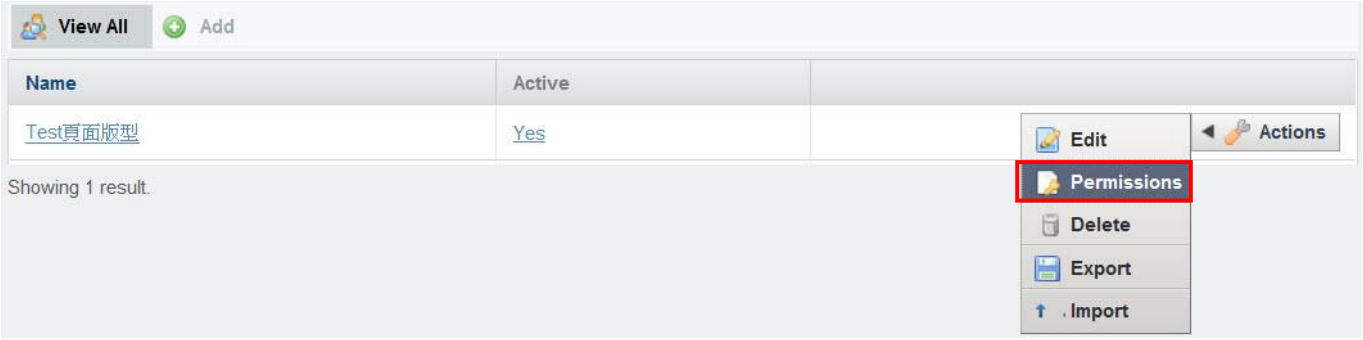
Click “Actions” on the right of “Page Templates” data entry and then select “Edit” to access edit page.



- Configuration: Click “Open Page Template”, user can access edit page to edit the site pages by opening a new window page
- For page template data, please refer to the foregoing “Add Page Template” section.

9.3.10.5 Page Templates Permissions

Click “Actions” on the right of “Page Templates” data entry and then select “Permissions” to access the permission setting page.

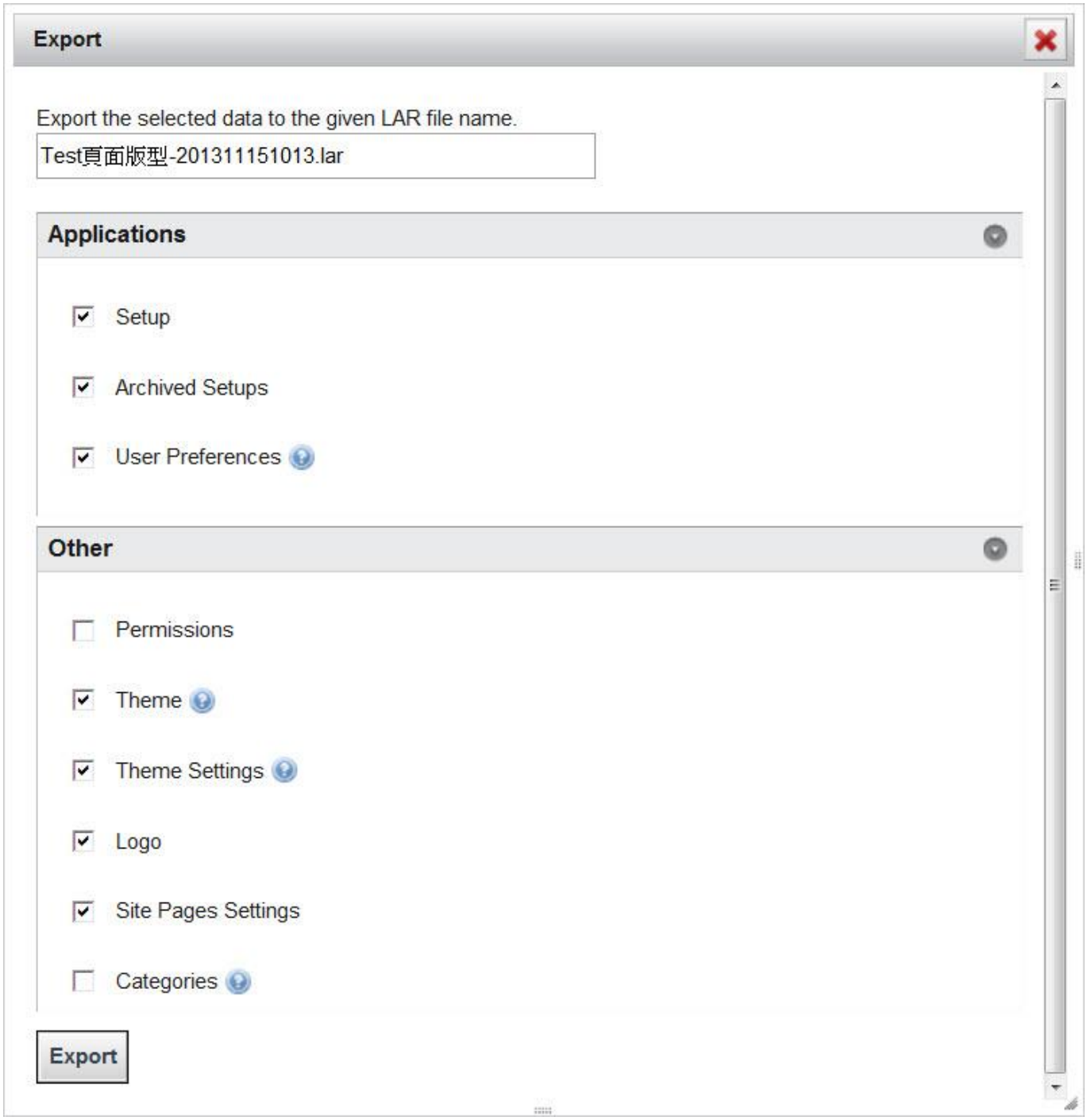


Permission setting:

Data entity	Page Template
Permitted to	View, Permissions, Delete, Update

9.3.10.6 Export Page Template

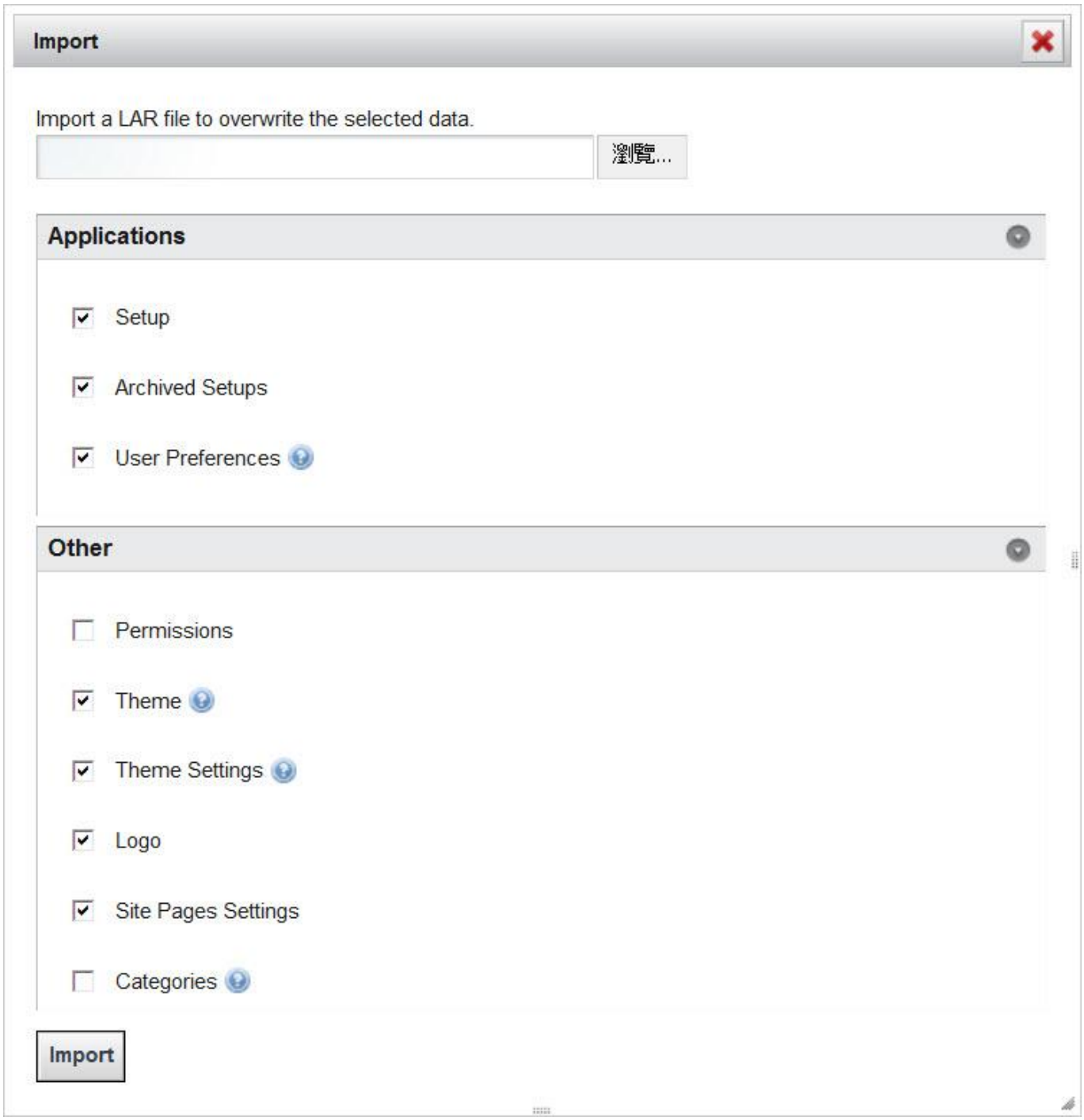
Click “Actions” on the right of “Page Templates” data entry and then select “Export” to export page template.



Please refer to “Export Site Template” section in “Site Templates”.

9.3.10.7 Import Page Template

Click “Actions” on the right of “Page Templates” data entry and then select “Import” to import page template.



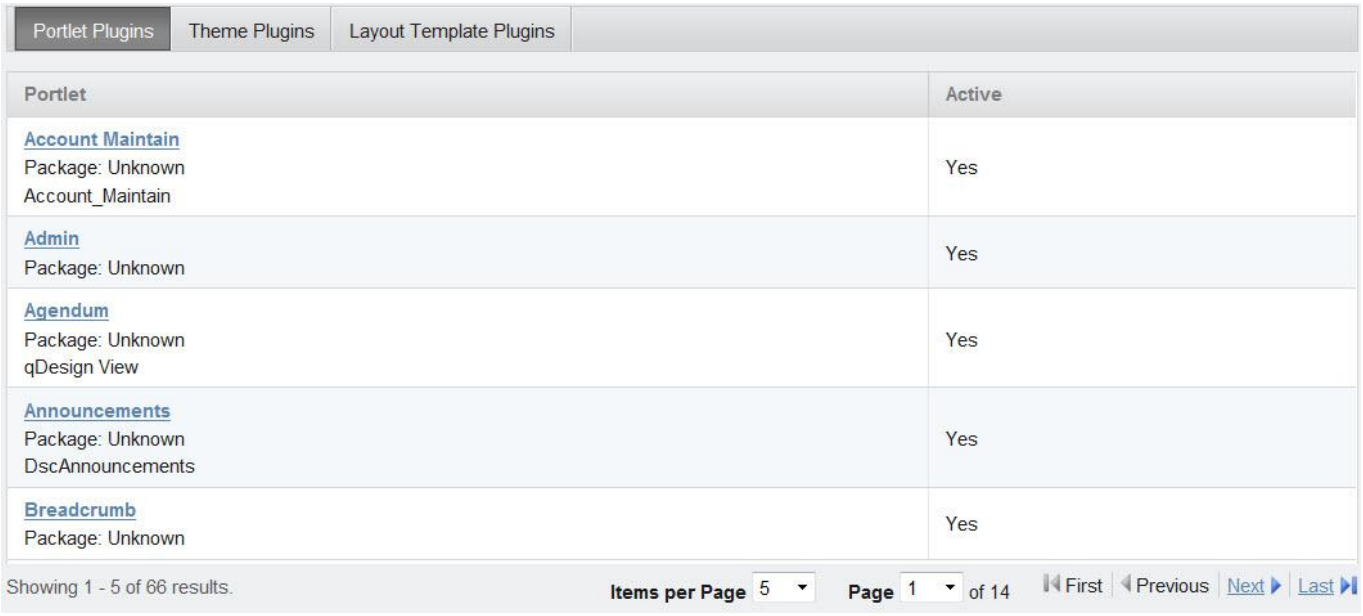
Please refer to “Import Site Template” section in “Site Templates” of “Portal Basic Setting”.

9.3.11 Plugins Configuration

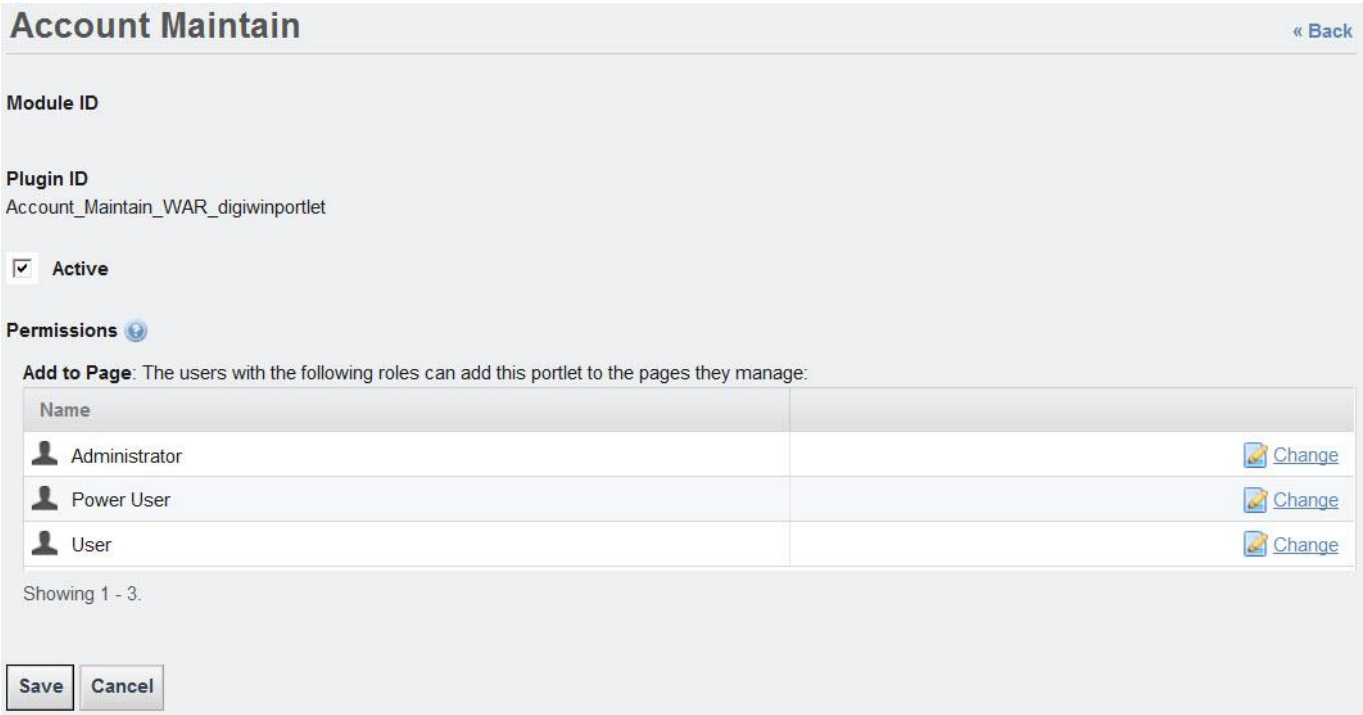
Plugins Configuration allows administrators to configure which portal roles have access to certain plugins.

9.3.11.1 Portlet Plugins Configuration

Press “Portlet Plugins” tag, portlet plugins will be listed below.



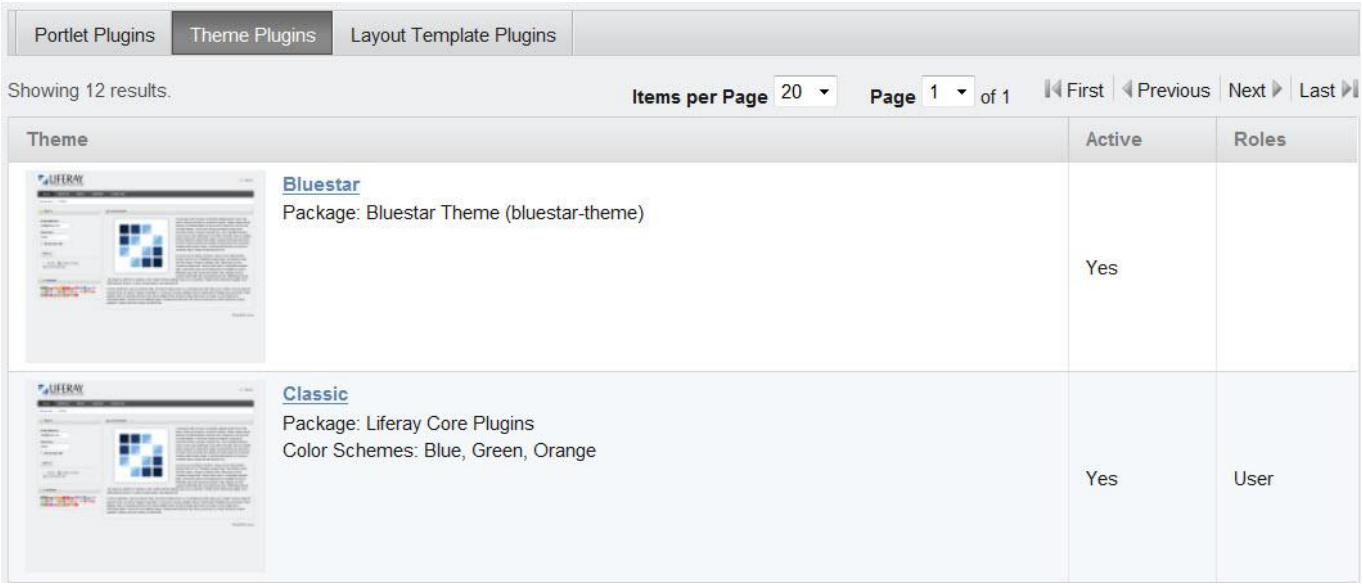
Click hyperlink of a portlet plugin to enter the configuration page.



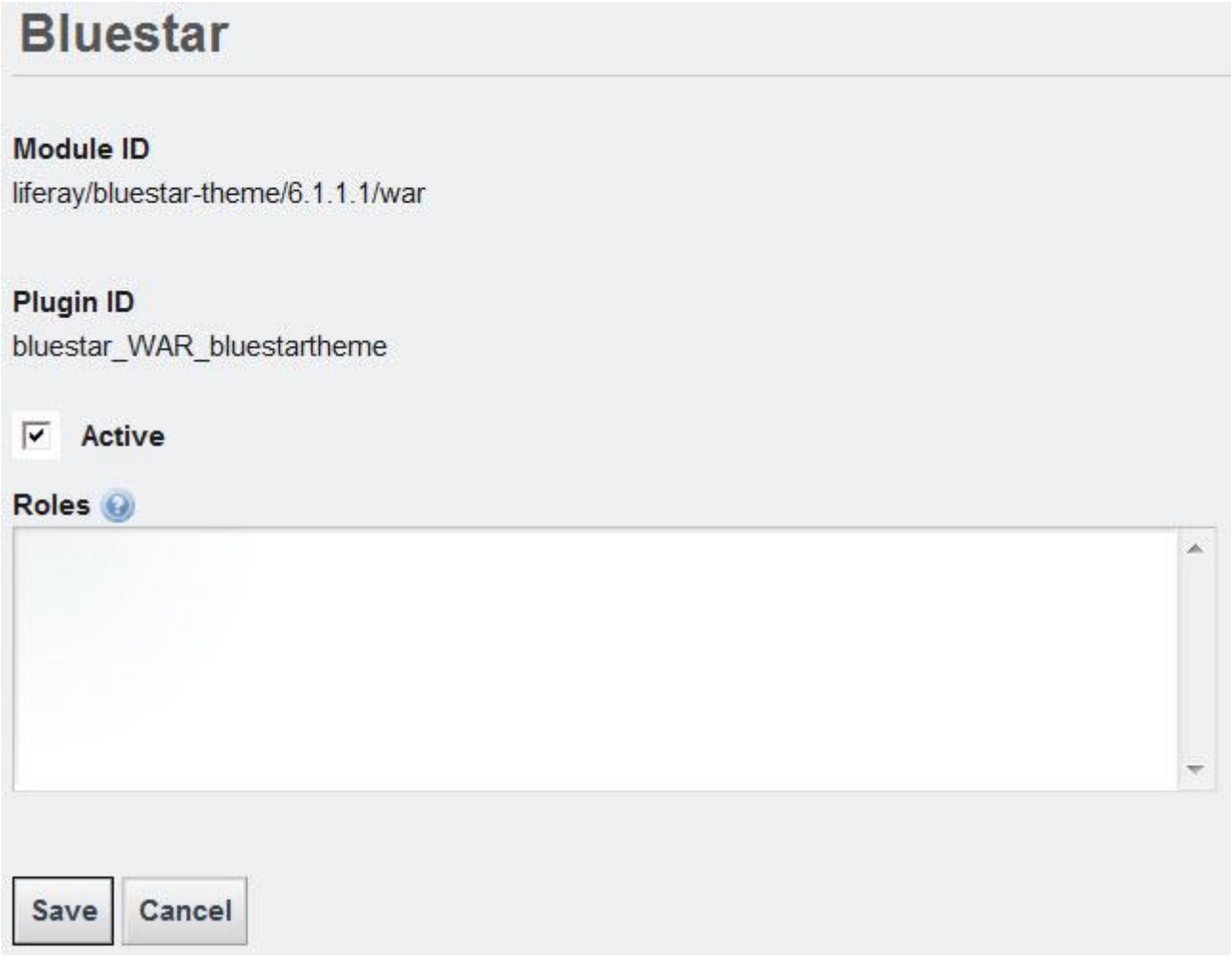
- Active: Enable the portlet plugin, it could be selected in page
- Permissions: You can assign or remove permissions to a role from the roles administration using the action "Define Permissions" for the role of choice.

9.3.11.2 Theme Plugins Configuration

Press “Theme Plugins” tag, theme plugins will be listed below.



Click hyperlink of a theme plugin to enter the configuration page.

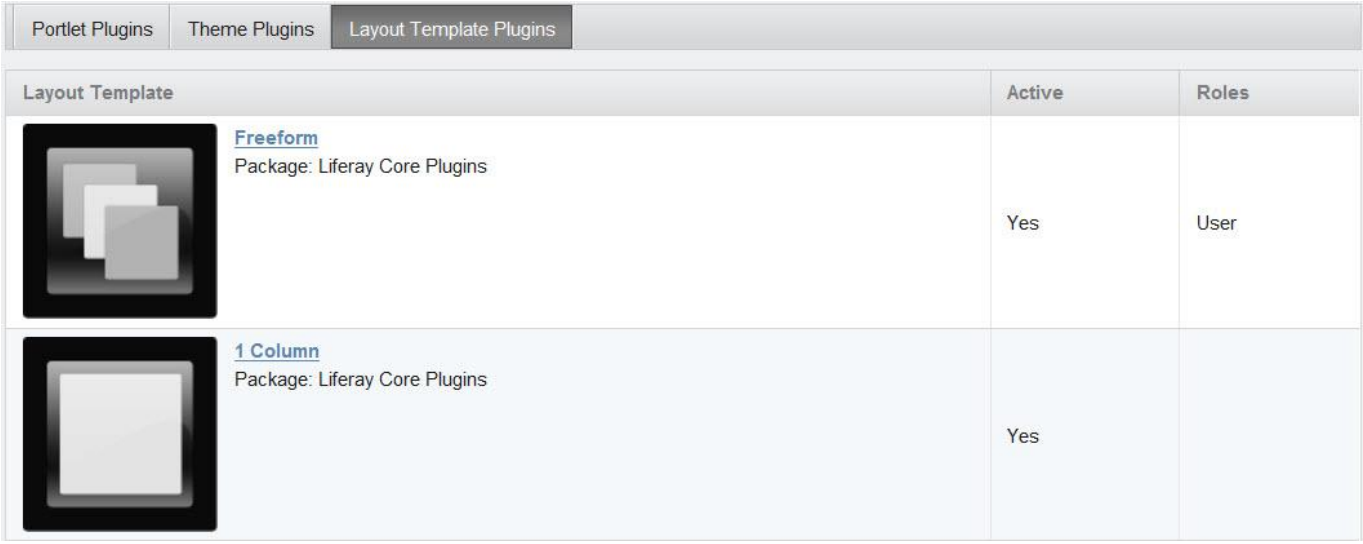


- Active: Enable the portlet plugin
- Roles: Enter one role name per line. A user must belong to one of these roles in order to add this

plugin to a page

9.3.11.3 Layout Template Plugins Configuration

Press “Layout Template Plugins” tag, layout template plugins will be listed below.



Click hyperlink of a layout template plugin to enter the configuration page. The setting refer to “Theme Plugins Configuration”.

9.4 Integration Settings

9.4.1 Service Mapping

Please refer to “SSO system setting” section in “Integration setting”.

9.4.2 Company

Please refer to “Company” section in “Integration setting”.

9.5 Server

9.5.1 Server Administration

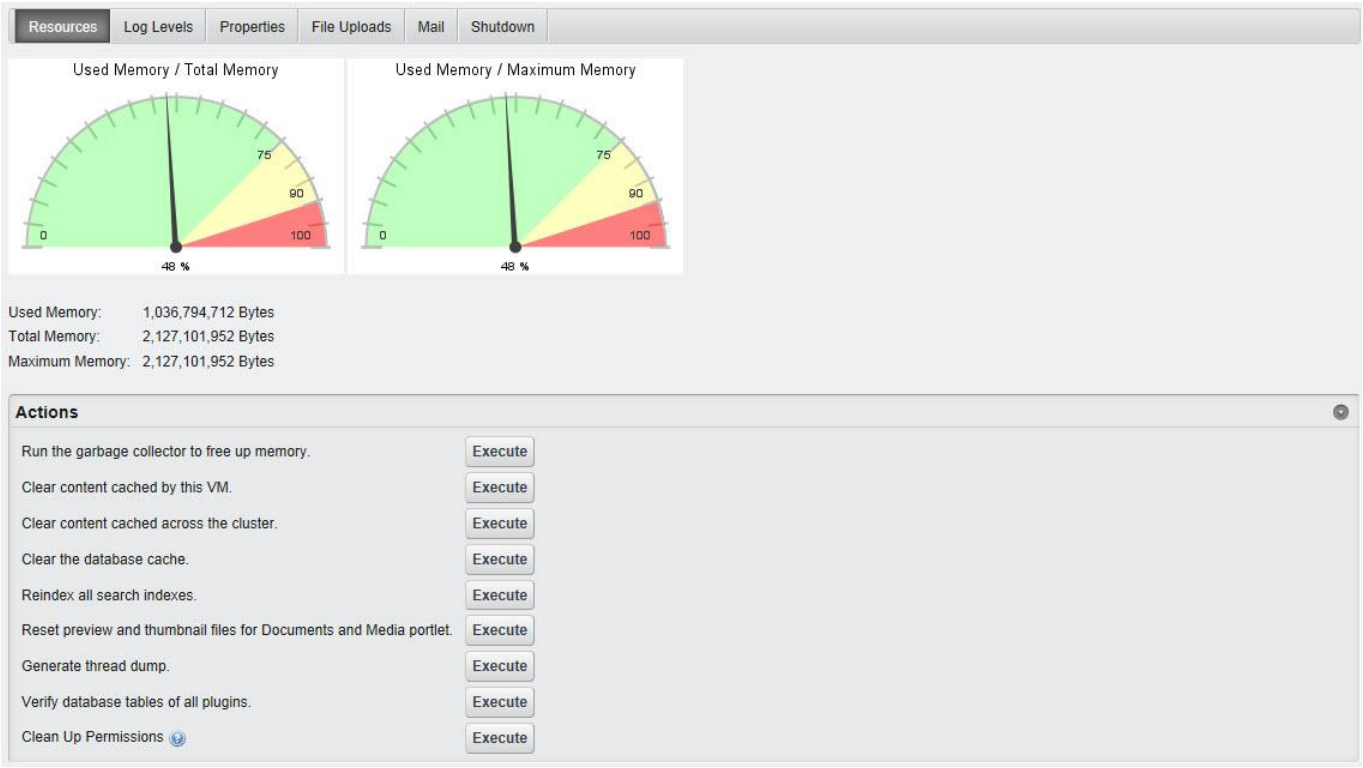
9.5.1.1 View Portal Authorization Information

This feature enables the administrator to view the version and authorization information of Portal system.

- Portal version No. and release date: In the following figure, version No. is 6.1.2.1 and release date is 10/07/2013
- Number of authorized personnel: Number of persons authorized by Portal system
- Uptime: Accumulated online time of Portal system

9.5.1.2 View System Resource

This feature enables the administrator to view resource utilization of Portal system.

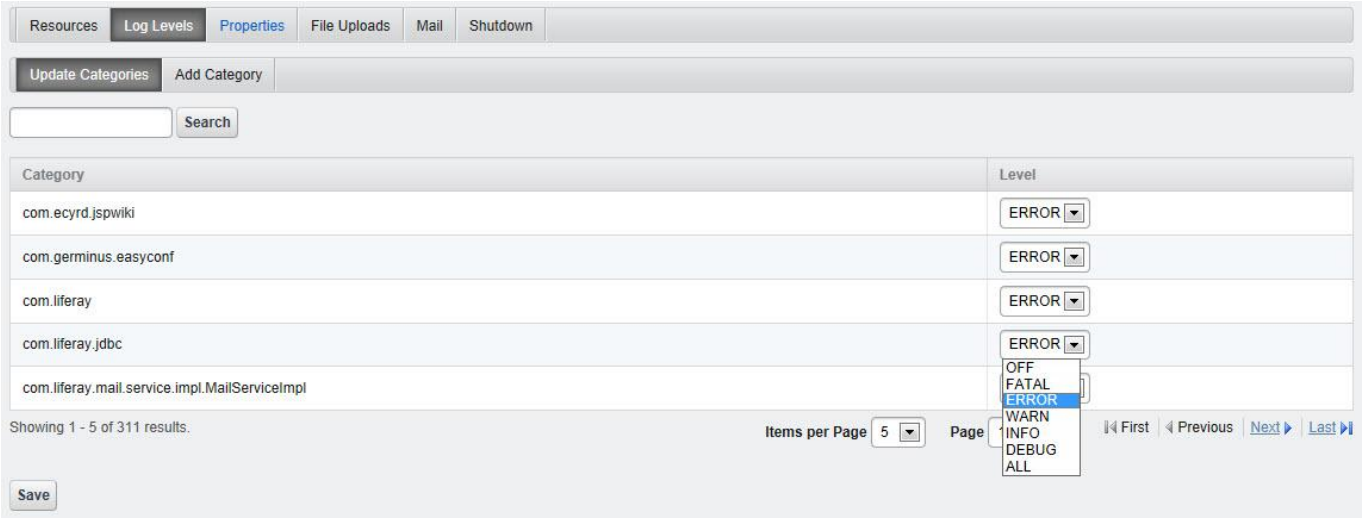


- Memory usage:
  - Used Memory: Capacity already used by Portal system
  - Total Memory: Capacity already assigned to Portal system
  - Maximum Memory: Capacity which may be assigned to Portal system

  The percentage of memory used is graphically displayed
- Other functions:
  - Run the garbage collector to free up memory: Execute Java Garbage Collector to release memory
  - Clear content cached by this VM: Remove cache of the VM
  - Clear content cached across the cluster: Remove cache of Cluster
  - Clear the database cache: Remove cache of database
  - Reindex all search indexes: The time required is long if data size is big; it is recommended that it be done only when necessary
  - Reset preview and thumbnail files for Documents and Media portlet
  - Generate thread dump
  - Verify database tables of all plugins
  - Clean Up Permissions: This process removes the assignment of some permissions on the Guest, User and Power User roles in order to simplify the management of "User Customizable Pages". Notably, "Add To Page" permissions is removed from the Guest, and User role for all portlets. Likewise the same permission is reduced in scope for Power Users from portal wide to scoped to "User Personal Site".

9.5.1.3 View System Log Level

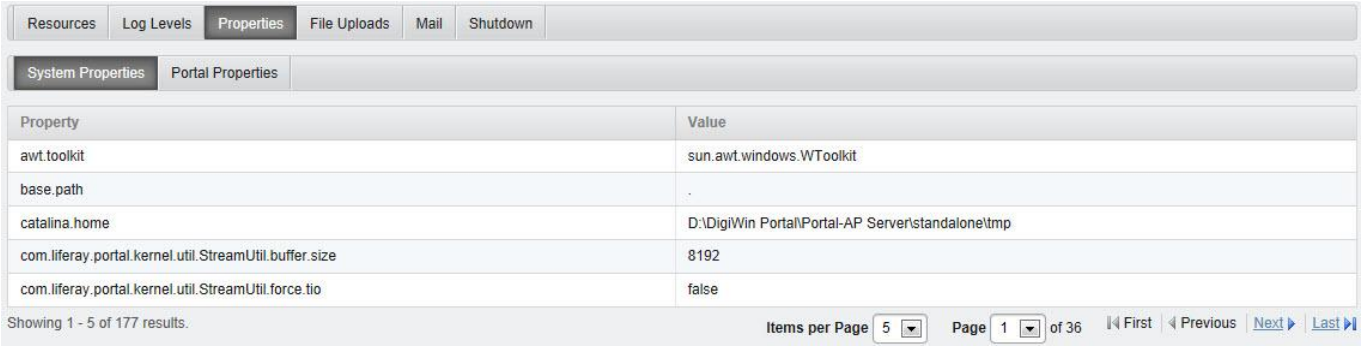
This feature enables the administrator to view Portal system's Log (system log) type and hierarchy. Log (system log) records alarms and error messages of application programs, and provides useful information for inspection in case of any system abnormality.



Tips Adjusted Log level is effective only during current server runtime. Portal system will return to default after system restart.

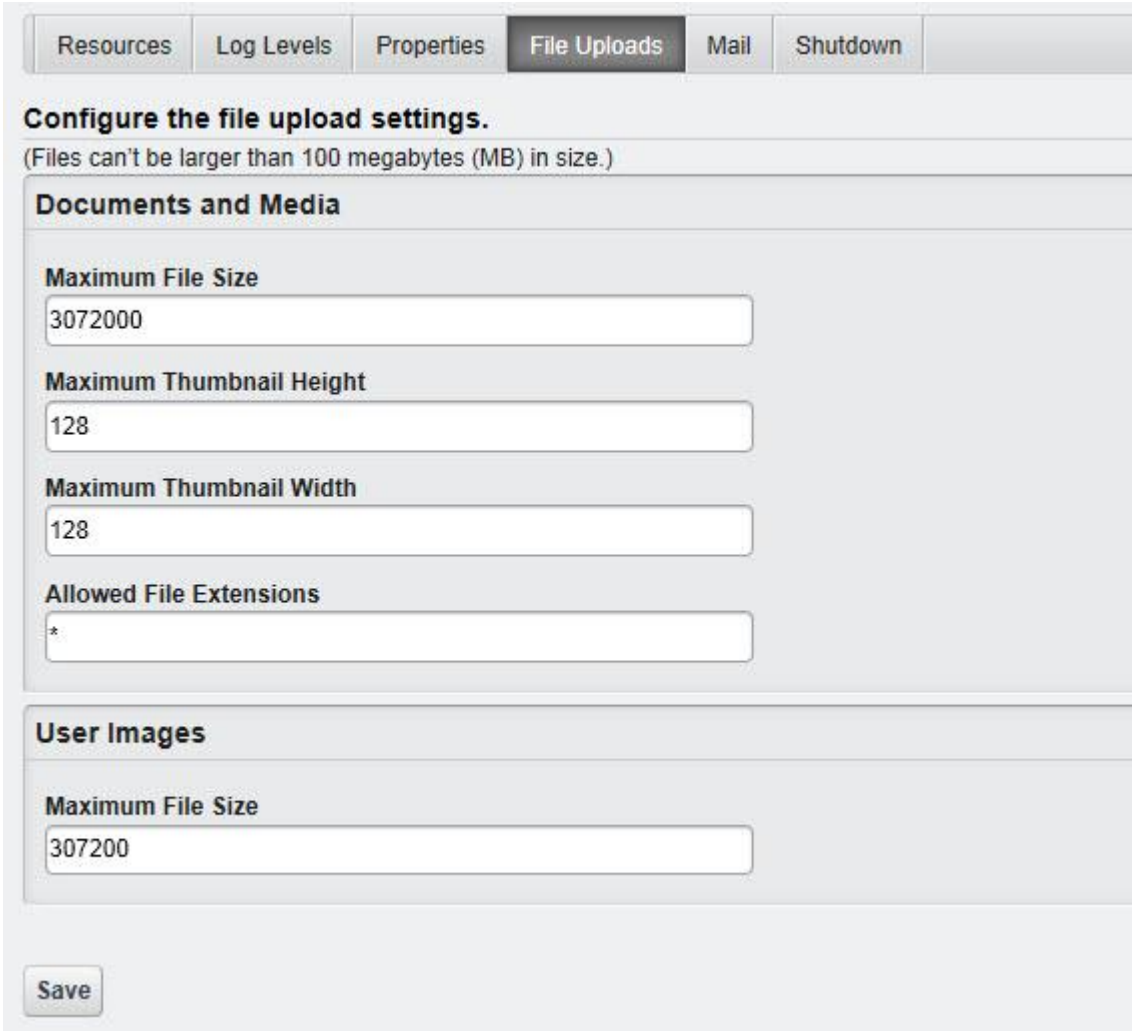
9.5.1.4 View System Attribute

This feature enables the administrator to view Portal system's attributes and their settings.



9.5.1.5 File Upload Setting

This feature enables the administrator to make file upload settings, including file size limit, allowable file extensions…



- Document and Media
  - Maximum file size: Set upper limit on the size of uploaded file in file management
  - Maxinum Thumbnail Height: Set maximum height of thumbnails displayed in document and media
  - Maxinum Thumbnail Width: Set maximum width of thumbnails displayed in document and media
  - Allowable File Extensions: Set the type of files that can be uploaded in file management

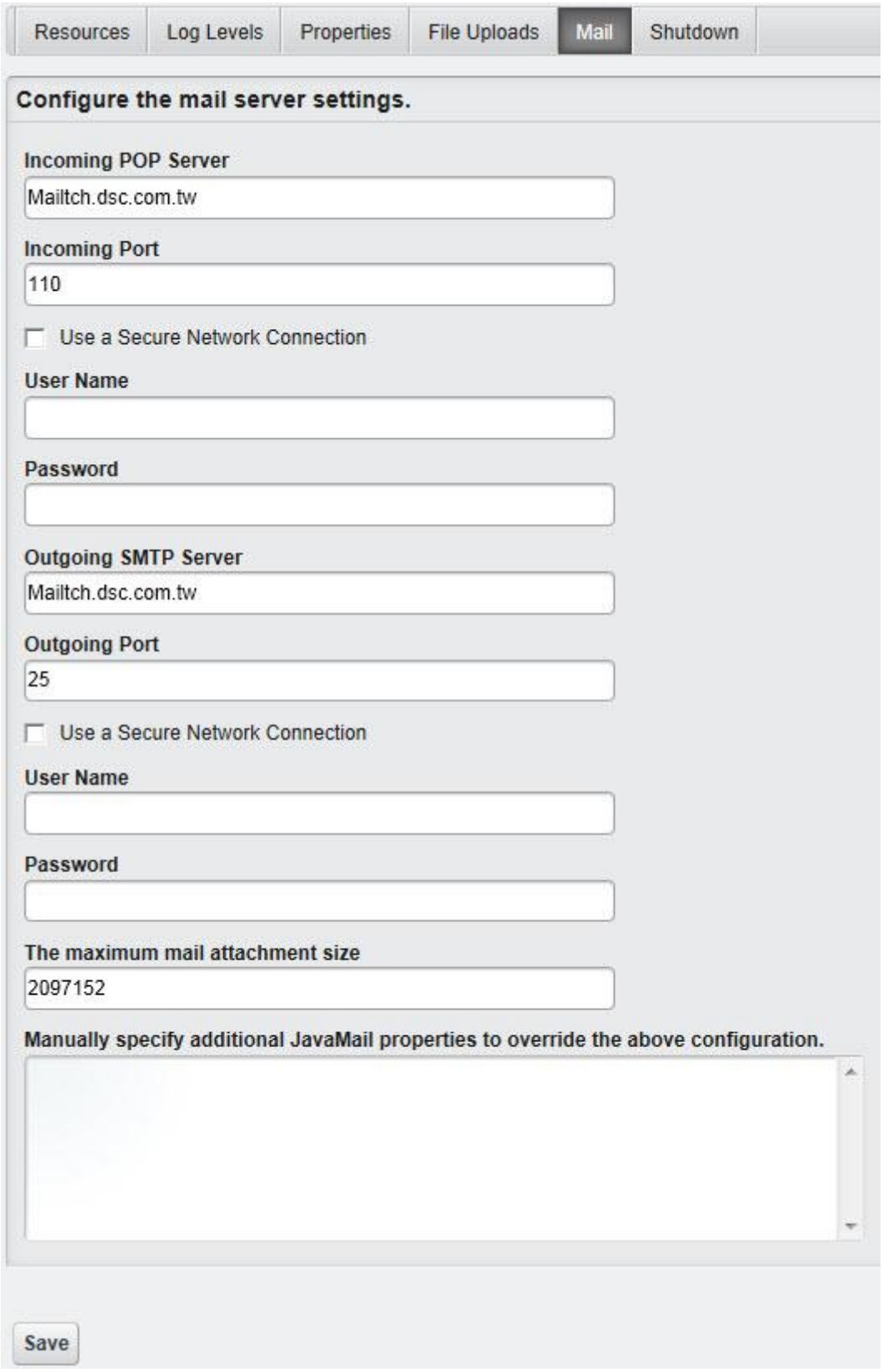
Tips Document and media provides the function of thumbnail view, which displays original picture with big dimension in a thumbnail with fixed dimension. Setting of maximum thumbnail dimension: Take the setting of 150 as an example. If the length or width of the original picture exceeds 150, then thumbnail dimension is 150; if the dimension of the original picture is below 150, there will be no thumbnail.

- User Images:

- Maximum File Size: Set upper limit on the size of uploaded file for user picture

9.5.1.6 Mail Server Setting

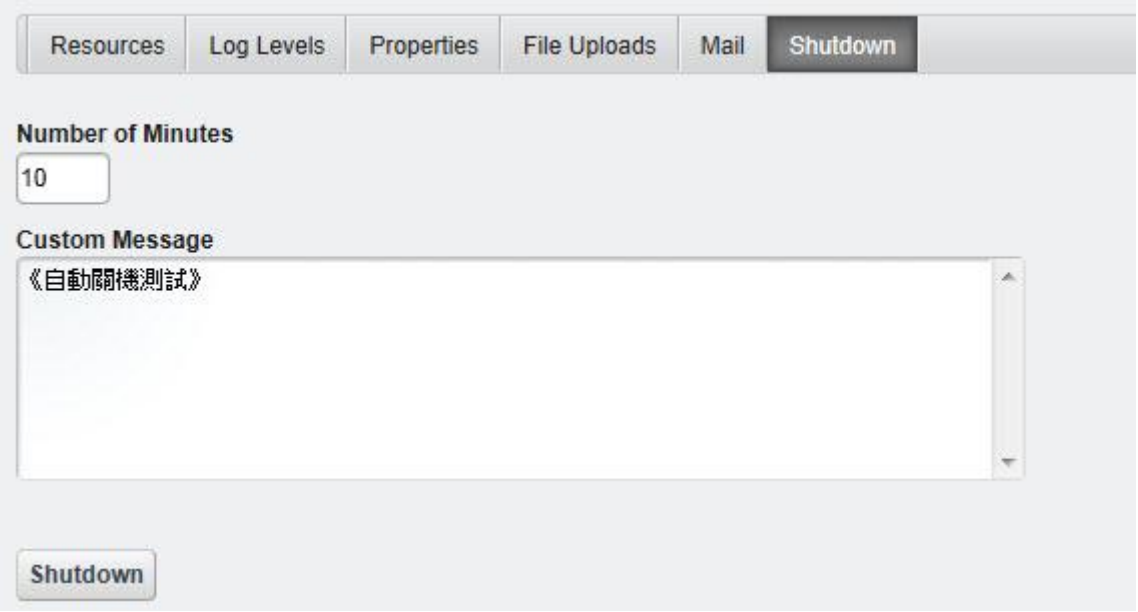
This feature enables the administrator to make Mail server setting.



- Inbound server
  - Incoming POP server: Enter the address of inbound server
  - Incoming Port: Enter the inbound server port
  - Use a Secure Network Nonnection: Check it for activation of secure network connection
  - User Name, Password: Enter account and password of login E-mail server
- Outbound server
  - Outgoing SMTP server: Enter the address of outbound server
  - Outgoing Port: Enter the outbound server port
  - Use a Secure Network Connection: Check it for activation of secure network connection
  - User Name, Password: Enter account and password of login E-mail server
  - The maximum mail attachment size: Enter the upper limit of the mail attachement size
  - Manually specify additional JavaMail properties to override the above configuration: Enter the additional settings

9.5.1.7 Server Automatic Shutdown Setting

This feature enables the administrator to set the time and prompt message of shutting down Portal system automatically.



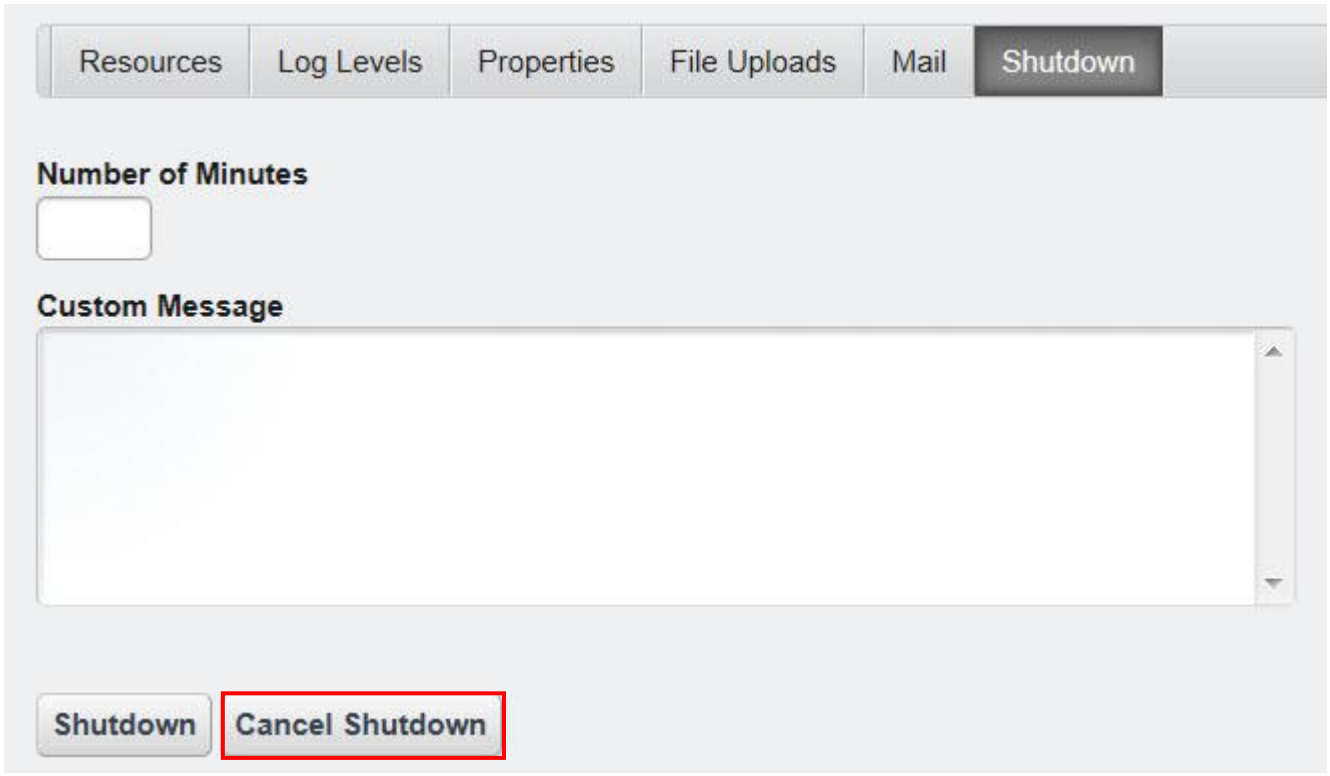
- Number of Minutes: Enter the countdown of automatic shutdown (in the unit of minutes)
- Custom Message: Enter the prompt message of shutdown. After setting, click “Shut down”.

Tips This setting operates only once. The user-defined shutdown setting will be removed after automatic shutdown of Portal system.

After the setting of automatic shutdown, the shutdown prompt message will appear on the top of Portal system view for all users.

Maintenance Alert 2:14 PM CST The portal will shutdown for maintenance in 9 minute(s). You will automatically be signed out at that time. Please finish any work in progress. After the maintenance has be completed, you will be able to successfully sign in. 《自動關機測試》
Close

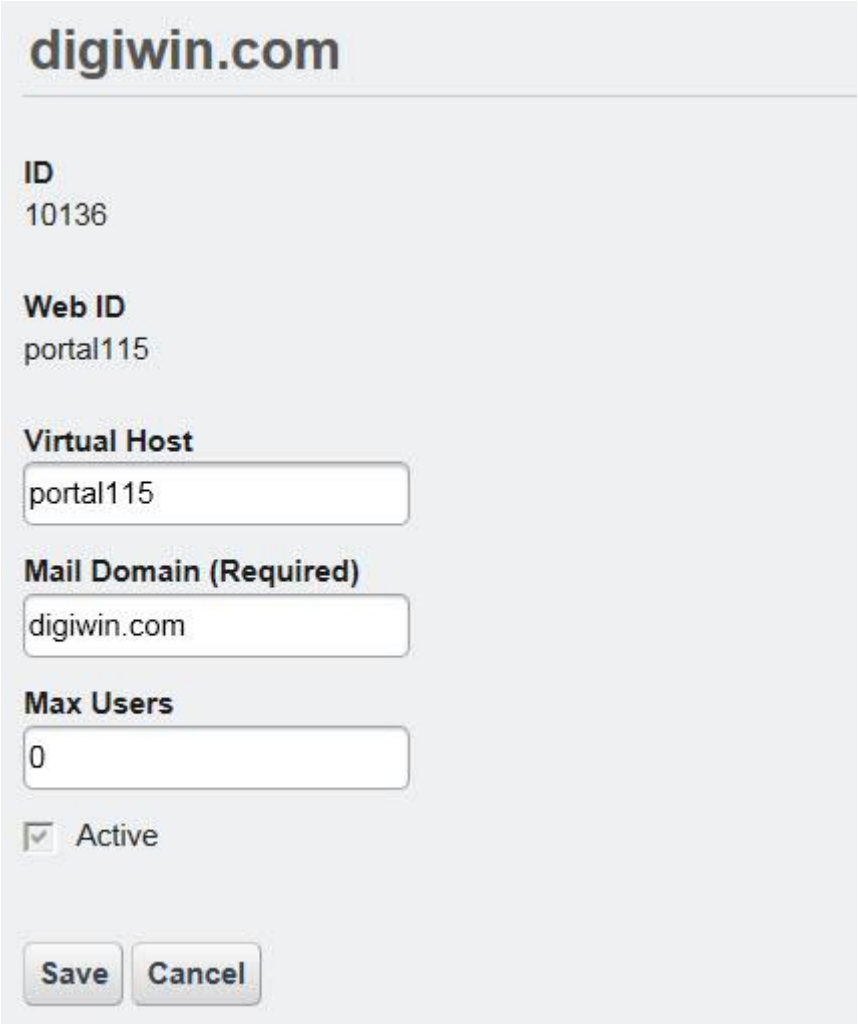
To cancel automatic shutdown, please access the shutdown setting view and just click “Cancel shutdown”.



9.5.2 Portal Instances

Portal Instances allow administrators to run more than one portal instance on a single server. Data for each portal instance are kept separate from every other portal instance.

Instance ID, Web ID, Virtual Host, Mail Domain, Number of Users, Maxinum Number of Users are listed. Click any link of “Portal Instances” data entry to access edit page.



- ID: ID of the Portal instance
- Web ID: Web ID of the Portal Instance
- Virtual Host: Enter the the virtual host information
- Mail Domain: Enter the mail domain
- Max Users: Enter the maximum users. If unlimited, enter 0

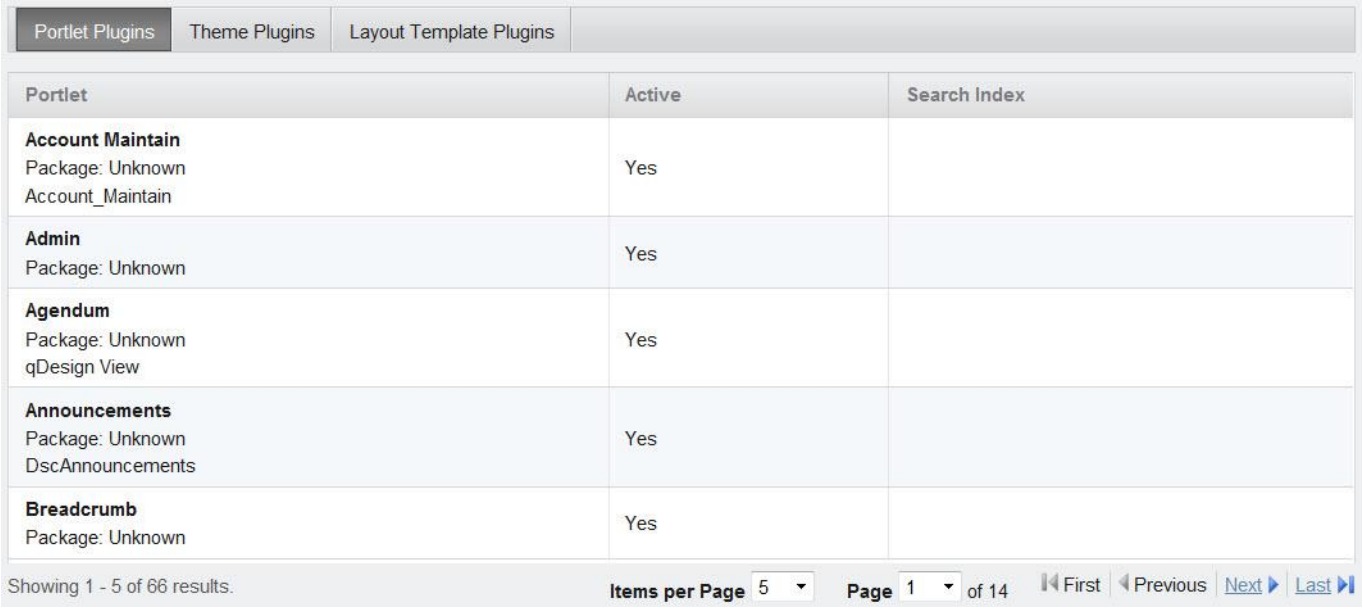
9.5.3 Plugins Installation

Plugins Installation allows users to install additional plugins from the Liferay repository or install custom plugins

Tips This Plugins Installation will be replaced with Liferay Marketplace in future Liferay releases. Read more about Liferay Marketplace (http://www.liferay.com/marketplace) for additional details.

9.5.3.1 View Portlet Plugins

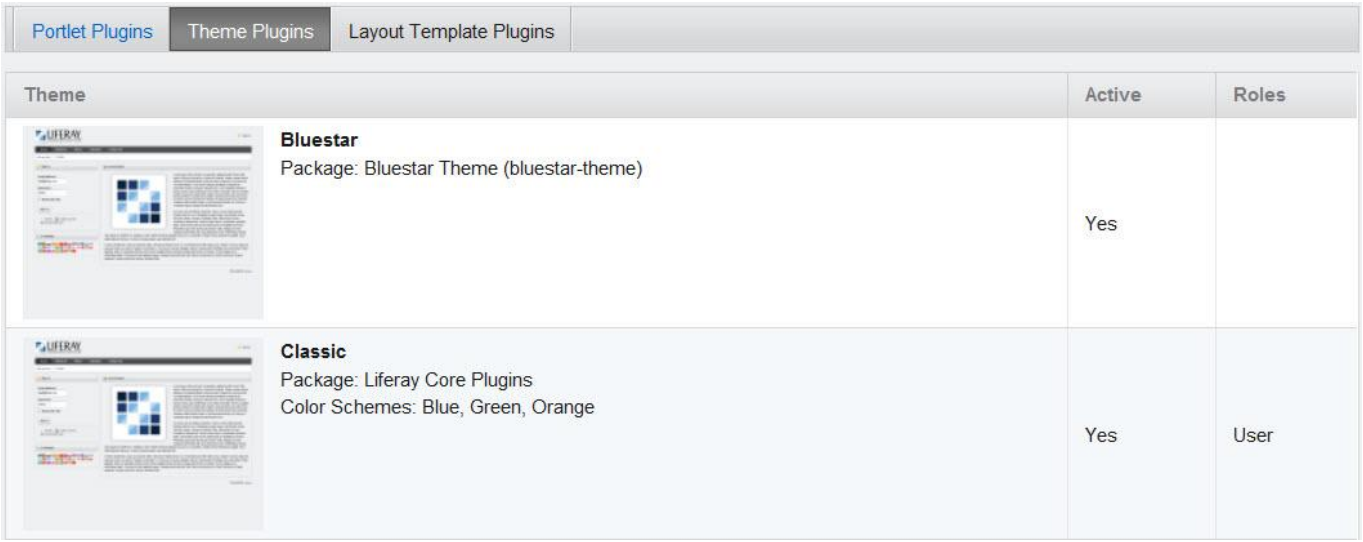
Press “Portlet Plugins” tag, portlet plugins will be listed below.



The setting refers to “Portlet plugins Configuration” section in “Plugins Configuration” of “Portal Basic Setting”.

9.5.3.2 View Theme Plugins

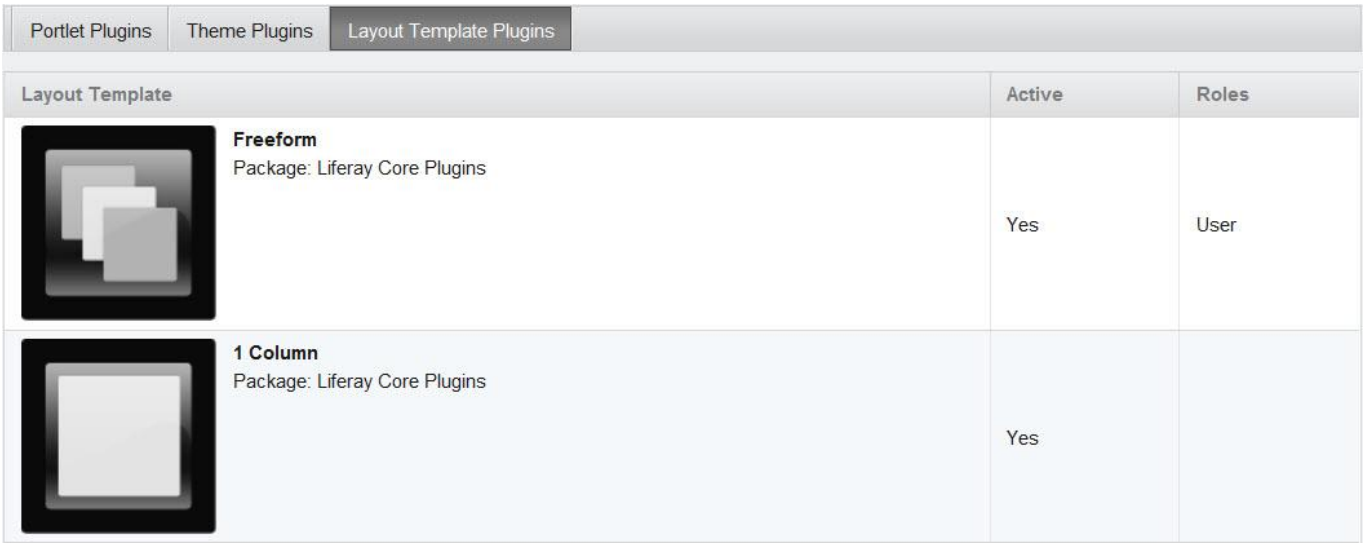
Press “Theme Plugins” tag, theme plugins will be listed below.



The setting refers to “Theme plugins Configuration” section in “Plugins Configuration” of “Portal Basic Setting”.

9.5.3.3 View Layout Template Plugins

Press “Layout Template Plugins” tag, layout template plugins will be listed below.



The setting refers to “Layout Template plugins Configuration” section in “Plugins Configuration” of “Portal Basic Setting”.